CAMA ACAM

CHARTING YOUR COURSE

A LEADERSHIP TOOLKIT FOR MUNICIPAL CAOS

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INTRODUCTION: YOUR LEADERSHIP JOURNEY BEGINS

STEPPING INTO THE CAO ROLE – CHARTING YOUR LEADERSHIP COURSE

Welcome to your new role as Chief Administrative Officer (CAO) — a major leadership milestone and one of the most impactful positions in public service. **Most CAOs will tell you: "no two days are the same, but every decision matters."**

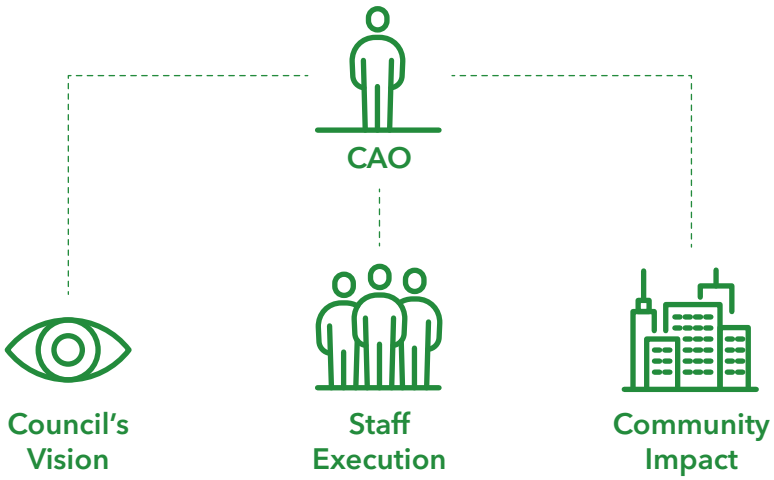
Every municipality has its own story — and behind every successful community is a skilled CAO guiding its progress. This role will grow you, challenge you, and leave a lasting imprint on both your organization and the community you serve, whether you're transitioning from another sector or stepping up within municipal government.

Throughout this Toolkit, the term *Chief Administrative Officer* (CAO) is used to describe the senior-most administrative leader in a municipality. However, depending on your jurisdiction or local government structure, this role may also be referred to as City Manager, Senior Administrative Officer *(SAO), Municipal Manager, Administrator*, or another similar title. While the title may vary, the principles of leadership, governance, and strategic management described in this Toolkit apply universally.

As CAO, you are the strategic link between Council's vision, staff execution, and community impact. You are the trusted advisor to Council, the leader of staff, and the bridge to the public. You will wear many hats: strategist, diplomat, innovator, and steward of trust. This role demands more than technical expertise — it calls for political acuity, emotional intelligence, resilience, and the ability to lead through complexity, change, and opportunity.

You will be required to guide others, hold boundaries, remain politically neutral, and lead with integrity — often all in the same day. No two CAO positions are exactly alike, but all require strong judgment, calm under pressure, and a clear sense of purpose.

This is a CAMA resource designed not only for onboarding but also for ongoing mentorship and CAO leadership development throughout your career.



This Toolkit is your roadmap for that journey. It was created to help you navigate your transition with clarity, confidence, and resilience — whether you're preparing to take on the role or have already stepped in. Inside, you'll find:

- **Foundational knowledge** about the CAO's responsibilities, role clarity, and local government dynamics.
- **Practical strategies** for managing Council relationships, internal teams, and public expectations.
- **Templates and checklists** to streamline your first 100 days and guide long-term success.
- **Insights from experienced CAOs** on the realities of the job — including what they wish they had known.

This Toolkit won't have every answer — but it will help you ask the right questions, build the right relationships, and begin your journey with confidence and courage.

Whether you are starting in a small rural town or a growing urban centre, you are not alone. The municipal CAO community — along with national support through CAMA — is here to help you lead effectively, stay grounded, and chart your course with purpose.

You are not just starting a new position — you are charting the course for your community and your career.

Let's get started.

Already in the CAO Role?

If you're already serving as a CAO, this Toolkit is still a valuable resource. Whether you're facing new challenges, seeking a refresher, or looking to strengthen specific leadership skills, the content throughout is designed to support your continued growth. Use it as a reference guide, a source of practical strategies, and a reminder that you're not alone in this role.

Note: For ease of reference and practical application, this Toolkit includes a one-page CAO Success Checklist in **Appendix A**. This checklist summarizes key actions and competencies from the Toolkit and can be used as a self-assessment tool during onboarding, transition, or ongoing professional reflection.

THE ROLE OF THE CAO

Stepping into the CAO role is both exciting and demanding. The emotional toll can be significant, particularly due to political pressures, Council expectations, and public scrutiny.

Challenges You Will Face

- **Public & Council Scrutiny:** Decisions will be questioned, and criticism may be frequent.
- **Crisis Management:** CAOs often deal with unexpected emergencies, from political scandals to community crises.
- **Balancing Stakeholder Interests:** Juggling the needs of Council, staff, and residents is a constant challenge.

CAO Pro Tip: Normalize the Pressure

The stress that comes with this role isn't a personal failing—it's a leadership reality. Normalize conversations about mental health with your team and peers. Creating space to talk about it openly not only protects your wellbeing—it models the kind of culture your organization needs.

Strategies for Building Emotional Resilience

The CAO role is as emotionally demanding as it is strategic. Managing public scrutiny, political tension, and high expectations requires intentional strategies to sustain your energy and mental health.

- **Stay Professional but Detached:** Focus on governance and facts, not personal attacks. Ground yourself in your values and the principles of good government, especially during contentious debates or public criticism.
- **Build a Strong Support System:** Leadership can be lonely, but you don't have to navigate it alone. Connect with mentors, peer CAOs, and professional associations like CAMA for guidance and support.
- **Set Healthy Boundaries – Define Your Availability with Intention:** Work-life boundaries look different for everyone. Some CAOs are comfortable being available around the clock, while others require clearer separation to recharge and lead effectively. Don't be afraid to set boundaries that work for you – including when you will and won't be available outside of regular working hours. The key is to be consistent, communicate clearly, and ensure your approach supports both your well-being and your ability to serve.

- **Prioritize Self-Care and Healthy Habits:** Incorporate regular exercise, mindfulness, healthy eating, and sleep into your routine. These aren't indulgences—they're necessities for sustaining high-performance leadership.

CAO Pro Tip: You Can't Pour from an Empty Cup

Your ability to lead others begins with how you care for yourself. Prioritizing your wellbeing isn't a sign of weakness—it's a leadership imperative. Make time for rest, reflection, and renewal. A well-rested, grounded CAO is more effective, more strategic, and better equipped to manage pressure with confidence.

- **Recognize Burnout Before It Takes Hold:** Warning signs include emotional exhaustion, cynicism, and reduced effectiveness. Seek professional support early if these arise. Remember: asking for help is a leadership strength, not a weakness.
- **Pause Before Reacting:** Not every issue demands an immediate response. Political pressure and public complaints can create urgency that feels real—but thoughtful, measured responses are often more impactful. Take a breath, reflect, and respond with strategy rather than emotion.
- **Practice Mindfulness in High-Stake Situations:** Before Council meetings, media interviews, or difficult conversations, take a moment to center yourself. Even a few deep breaths can restore clarity and calm.

CAO Pro Tip: It's Fulfilling–but Bring Snacks and a Stress Plan

Being a CAO is deeply meaningful work—but it can also be isolating and politically intense. Some days, you'll feel energized by your impact; other days, you'll just need granola bars and a support network. Pack both. Resilience isn't just a mindset—it's a leadership practice.

As Chief Administrative Officer (CAO), you are the pivotal link between Council's vision, the organization's daily operations, and the community's evolving needs. Few roles in government require the same breadth of responsibility, strategic influence, and adaptability.

Unlike other leadership positions, the CAO operates at the intersection of politics, policy, and public service, managing in three directions—**up to Council, down to staff, and out to the community**. Your ability to balance governance, administration, and financial stewardship is what drives a municipality's long-term success.

CAO Pro Tip: Remember, the most successful CAOs master political dynamics without being consumed by them.

Navigating Governance and Management: The Dual Role of the CAO

One of the most challenging aspects of being a CAO is navigating the delicate space between governance and management. While these two concepts are distinct, the CAO must operate with fluency in both—serving as a trusted advisor to Council (governance) and the senior leader of staff and operations (management).

The CAO's Dual Role

As CAO, you are neither purely political nor purely administrative. You operate at the intersection:

- **Advisor to Council:** You guide decision-making by providing evidence-based recommendations, identifying risks, and interpreting operational impacts of policy choices.
- **Leader of Administration:** You lead staff in executing Council's direction while upholding professional standards and ensuring effective service delivery.

Balance is key. Overstep into political advocacy or Council debate, and you risk compromising neutrality. Focus too narrowly on operations, and you may fail to provide advice or protect your organization from overreach.

What is Governance?

Governance refers to the strategic oversight and policy-setting role carried out by Council. It includes:

- Establishing the municipality's vision, mission, and strategic priorities.
- Adopting bylaws, policies, and budgets.
- Holding the CAO accountable for implementation and performance.

In essence, **governance is about doing the right things**—setting direction, ensuring accountability, and representing the public interest.

What is Management?

Management is the domain of staff, led by the CAO. It includes:

- Implementing Council's decisions and strategic plan.
- Supervising staff and overseeing daily operations.
- Managing finances, risk, contracts, and service delivery.

Management is about **doing things right**—executing policy effectively, within legislative and operational frameworks.

Maintaining Boundaries

Clear boundaries between Council's governance role and your management role:

- Protect administrative impartiality.
- Prevent micromanagement.
- Ensure decisions are made at the appropriate level.

When boundaries are respected, it fosters trust, clarity, and a more productive working relationship between Council and administration.

CAO Pro Tip: Teach the Difference Early

Use Council orientation and strategic planning sessions to reinforce the distinction between governance and management. Provide examples of where the line can blur and how you can work together effectively within your respective roles.

Governance vs. Management: Who Does What?

Governance (Council)	Management (CAO & Administration)
Sets the vision and strategic priorities.	Translates Council's vision into operational plans.
Establishes policies and bylaws.	Implements policies through programs, services, and standing operating procedures (SOPs).
Approves municipal budgets.	Prepares budgets and manages day-to-day financial operations.
Provides direction through resolutions and official decisions.	Oversees staff and allocates resources to deliver services.
Represents the public interest and community values.	Advises Council with professional, evidence-based recommendations.
Holds the CAO accountable for results.	Manages and evaluates all municipal staff.
Approves major projects, partnerships, and long-term strategies.	Executes capital projects and negotiates contracts under policy.
Engages with the public through meetings and strategic outreach.	Ensures public communication, service delivery, and engagement.
Monitors organizational performance at a high level.	Collects data and reports on key performance indicators (KPIs).
Avoids involvement in individual human resources, procurement, or operational issues.	Handles human resources, procurement, staffing, and internal decisions.

Putting It All Together: The CAO in Action

Bringing together your strategic, governance, and operational responsibilities requires intentional leadership. You don't just manage an organization – you shape a municipality's future. While Council sets priorities, it is your responsibility to:

- **Translate policy into action** – ensuring municipal goals are effectively implemented.
- **Anticipate and respond to challenges** – from financial pressures to political dynamics.
- **Lead with vision and strategy** – creating a high-performing organization that delivers results.

Your role is one of the few that **touches every aspect of municipal life**—from how decisions are made at Council to how frontline services impact residents.

It also includes being the administrative voice of the organization:

- Communicating internally and externally,
- Educating Council, staff, and the community, and
- Engaging with residents to build trust and understanding.

Navigating External Partnerships & Intergovernmental Relationships

While much of the CAO's work focuses on internal governance and local service delivery, external collaboration is a growing and essential aspect of municipal leadership. From regional service agreements to Indigenous partnerships and intergovernmental funding negotiations, your ability to build and maintain respectful relationships beyond your municipality is critical.

Collaborating Regionally

Many municipalities — particularly smaller and rural communities — share services, infrastructure, and planning responsibilities with neighboring jurisdictions. These collaborations can be efficient but often come with governance complexities and political sensitivities. Importantly, regional partnerships can enhance access to funding opportunities, as provincial and federal programs often look favourably on municipalities that demonstrate collaboration and shared service models. Being seen as a credible and cooperative municipal partner can significantly bolster your success in securing internal funding:

- Clarify roles, responsibilities, and cost-sharing models in formal agreements.
- Build trust with your counterparts through regular communication and a focus on shared outcomes.
- Avoid territorial approaches — emphasize mutual benefit, especially in joint infrastructure, emergency services, or planning.

Tool Highlight: Structuring Council-Led Projects with Clear Terms of Reference

When Council or the CAO is tasked with coordinating a multi-jurisdictional or strategic initiative—especially one involving multiple municipalities or service areas—it's critical to establish a clear structure early on. A well-crafted **Terms of Reference (TOR)** helps define the purpose, scope, guiding principles, stakeholders, methodology, deliverables, and reporting expectations for the project.

TOR not only clarify roles and timelines but also help manage political and operational expectations across jurisdictions. For new CAOs, having a template to adapt for similar Council-driven initiatives—like regional shared services reviews or governance explorations—can save time and reduce confusion.

See **Appendix B – Sample Terms of Reference for Council Projects** for a customizable example.

Working with First Nations, Métis Settlements, and Indigenous Governments

In many regions, municipalities share boundaries or interests with Indigenous communities. These relationships are distinct and rooted in history, culture, and governance frameworks that differ from municipal structures.

- Take Indigenous relations and cultural awareness training to deepen your understanding.
- Recognize the autonomy of First Nations and Métis governments; approach partnerships with humility and respect.
- Seek to understand jurisdictional overlaps (e.g. water, infrastructure, housing) and build relationships rooted in trust, not transaction.

Engaging Other Orders of Government

Your success as CAO will often involve interaction with provincial/territorial and federal governments — whether advocating for funding, navigating legislation, or partnering on regional projects.

- Develop professional, non-partisan relationships with government staff and officials.
- Understand policy landscapes and tailor your municipal messaging accordingly.
- Be prepared to work through bureaucratic processes while advocating persistently for your community's needs.

CAO Pro Tip: Lead Beyond Municipal Boundaries

Great CAOs don't just manage their municipality — they shape their region. Collaboration is a leadership skill. When you build trust with external partners and other governments, your municipality gains influence, access, and the ability to shape its future more effectively.

Key Responsibilities

Managing Up: Supporting Council & Governance

Managing Down: Leading People and Organizations

Managing Out: Engaging with the Community

Balancing Governance, Operations, and Financial Stewardship

Managing Up: Supporting Council & Governance

- Provide clear, objective and strategic advice to help Council make informed decisions.
- Translate policy into realistic, actionable plans for the municipality.
- Build a professional CAO-Council relationship based on trust, neutrality, and transparency.
- Foster a culture of respectful and constructive discussions – even when navigating the most contentious or politically sensitive issues.

Managing Down: Leading People and Organizations

- Foster a workplace culture of collaboration, innovation, and accountability.
- Develop staff through mentorship, performance management, and succession planning.
- Lead through organizational change and foster a diverse, equitable, and inclusive workforce.

Tool Highlight: Clarifying Roles with the RASCI Method

One of the most effective tools for clarifying roles, breaking down silos, and aligning responsibilities across departments is the RASCI Method. This simple but powerful framework supports team effectiveness by mapping out who is Responsible, Approves, Supports, is Consulted, and Informed on various tasks. It promotes transparency, workload balance, and better communication across your leadership team.

To learn more and access a sample chart and step-by-step instructions, see **Appendix C – Understanding the RASCI Method.**

CAO Pro Tip: Know Your People, Not Just Their Roles

Consider using personality or workstyle assessments (like DISC, Insights Discovery, or Myers-Briggs) to better understand how your team members communicate, make decisions, and respond to pressure. These tools can provide valuable insight into what motivates individuals and how to build more effective working relationships. When used well, they can help you "speak their language" and lead more authentically—especially when stepping into an unfamiliar organization.

- Demonstrate leadership presence by being a visible and consistent leader who is not a micromanager, but is invested, committed, and shows genuine care and concern for employees.
- Support your team with steady, values-based leadership that builds trust, reinforces expectations, and encourages growth.

CAO Pro Tip: Invest Early in People Management Training

Managing people—up, down, and across—is one of the most complex and impactful parts of being a CAO. Yet many new CAOs enter the role without formal leadership training. One of the smartest investments you can make early in your tenure is seeking out professional development on performance management, conflict resolution, coaching techniques, and organizational culture. Strong people leadership builds trust, reduces risk, and strengthens your credibility across the organization. You don't need to know all the answers—but you do need to lead with clarity, empathy, and accountability.

Mentorship for CAO Development

Formal mentorship—whether through a structured program or informal peer connections—is one of the most effective ways to support growth, particularly for new CAOs or those working in smaller, more isolated municipalities. Mentorship can help with onboarding, navigating political dynamics, and offering a sounding board for tough decisions.

CAMA Support: If you are seeking guidance or a peer connection, CAMA's National Office can assist in connecting you with an experienced CAO, often outside your region, for confidentiality and a fresh perspective.

In addition to CAMA, each Province and Territory has its own professional Association—or in some cases, multiple Associations—for CAOs and senior municipal administrators. These organizations provide valuable training, peer support, networking opportunities, and policy resources tailored to their specific regional and legislative contexts.

See Appendix D – Provincial and Territorial CAO Associations for a full list and their websites.

Managing Out: Engaging with the Community

- Represent the municipality with professionalism and transparency.
- Strengthen public trust through effective communication and engagement.
- Address resident concerns and build meaningful stakeholder relationships.

Balancing Governance, Operations, and Financial Stewardship

- Offer impartial, strategic guidance while respecting political decision-making.
- Oversee budgets and ensure long-term financial sustainability.
- Lead through crises and evolving municipal challenges with composure.

Whether working in a small town or a large city, your leadership sets the tone for municipal success – through innovation, collaboration, and strategic execution.

The CAO as an Inclusive Leader

As a CAO, your leadership directly shapes the internal culture of your organization and the broader community you serve. Embedding equity, diversity, inclusion, and reconciliation into your leadership approach is essential to building a high-performing organization and fostering community trust.

Internally, inclusive leadership means creating a workplace where all employees feel valued, respected, and empowered. Externally, it involves ensuring municipal services and public engagement efforts are fair, accessible, and reflective of the diverse populations you serve.

Championing diversity in hiring, engaging underrepresented voices, promoting cultural competence, and supporting Truth and Reconciliation efforts are key leadership responsibilities. By leading with an inclusion and equity lens, you strengthen your municipality's resilience and create lasting, positive impact.

CAO Pro Tip: Inclusion is not a one-off initiative—it's a core leadership value that should shape your governance, operations, and relationships every day.

Why the CAO Role is Unique

The CAO role is unlike any other in municipal government. You are not just an administrator—you are a strategist, advisor, and leader of change.

- **You Shape the Future of a Community:** Your leadership directly impacts residents' quality of life and municipal sustainability.
- **You Drive Innovation:** From technology adoption to governance reforms, you have the opportunity to modernize operations.
- **You Build Meaningful Relationships:** You work closely with elected officials, municipal staff, and community leaders to drive progress.
- **You Provide Stability in a Changing Landscape:** While elected officials come and go, the CAO ensures continuity and strategic direction.

The role of CAO is demanding, but your ability to lead with vision and adaptability will define your legacy.

CAO Pro Tip: You Are Not Expected to Know Everything–You Are Expected to Lead.

New CAOs often feel pressure to know every detail and solve every problem themselves. But the reality is—**you lead a team** of professionals with the expertise to address complex issues collectively. Your strength lies in asking the right questions, listening deeply, and making informed decisions based on input from your staff. Trying to do it all not only leads to burnout but also undermines the talents of your team and limits organizational capacity. Trust in your people—and lead with confidence, not perfection.

Political Acumen: Managing Council & Governance Challenges

CAOs must navigate complex Council dynamics, shifting priorities, and governance challenges while maintaining professionalism and neutrality. Council members bring diverse perspectives, political motivations, and decision-making styles. Your role is to foster collaboration, provide balanced advice, and keep the municipality on track, even in times of conflict.

Key strategies include:

- **Building Credibility:** Consistently demonstrate expertise, transparency, and sound judgment.
- **Managing Political Pressures:** Remain neutral, providing Council with facts and options rather than opinions.
- **Handling Leadership Transitions:** Whether working with a new Council or navigating internal competition for the CAO role, focus on professionalism, strategic leadership, and long-term municipal success.
- **Bridging Divided Councils Without Taking Sides:** In municipalities where Council is divided, the CAO plays a crucial stabilizing role. While it's appropriate to identify areas of misalignment and facilitate governance solutions, it's essential to avoid deepening divisions. Focus on shared goals, promote evidence-based dialogue, and ensure all members feel heard. Neutrality doesn't mean disengagement—it means guiding the collective forward without political alignment.

CAO Pro Tip: Be Cautious with Informal Requests

When a Council member makes a request outside formal channels, pause and assess. Informal direction can quickly drift into a governance grey zone. Politely redirect to formal processes or bring the issue back to the full Council. Protecting process protects you—and the organization.

- **Upholding Boundaries with External Elected Officials:** From time to time, you may be contacted by a Councillor from another municipality regarding tensions with their own CAO or Council. As a professional courtesy—and to protect your neutrality—politely redirect them to their own administration. Offering advice in these cases can unintentionally entangle you in another municipality's political dynamics. Reinforce professional boundaries by focusing on your own organization's governance and referring them to trusted resources such as CAMA or peer networks.

Navigating political environments is one of the toughest aspects of the CAO role, but your ability to manage governance challenges with composure and confidence will define your effectiveness.

CAO Pro Tip: Lead with Strategic Focus and Professional Judgment

As CAO, exercising political acumen means knowing when to provide strong guidance and when to step back to allow the governance process to unfold. Not every issue requires direct intervention. Focus your efforts on matters that impact strategic priorities, municipal operations, or organizational well-being. Applying your influence with discretion fosters Council trust, maintains respectful dynamics, and reinforces your role as a steady, professional advisor. Thoughtful timing and diplomacy are key to long-term leadership success.

Additional Tips for Navigating Council Dynamics:

- **Clarify the Difference Between Council Direction and Staff Operations:** Council sets the vision and policy framework. Staff, led by the CAO, are responsible for implementation. It's important to regularly reinforce these boundaries, especially when individual Councillors begin to drift into operational oversight. Role clarity is essential to organizational integrity and efficiency.
- **When and How Should the CAO Speak at Council Meetings:** The CAO's role at Council meetings is to provide objective, professional advice—not to engage in debate. Speak when clarification is required, when asked for input, or when presenting reports. Avoid over-participating, as this can blur governance lines and shift focus away from Council deliberations.
- **Watch Other Municipalities' Council Meetings as Informal Training:** Observing how experienced CAOs interact during Council meetings—especially during difficult discussions—can offer valuable insight into tone, timing, and professional restraint. Many municipalities livestream or archive their meetings, making them an excellent professional development tool.

CAO Pro Tip: Integrity Over Approval

Your job is to speak the truth—even when it's not popular. Long-term trust is built on consistency, not agreement. Ground your recommendations in facts, values, and the public good. Popularity fades—integrity lasts.

Professionalism in Social Settings

Conferences, receptions, and social gatherings involving Council members, staff, and external stakeholders can blur the lines between personal and professional interactions—especially when alcohol is involved or when events take place outside formal settings.

As CAO, your conduct in these environments is not just a reflection of you—it sets the tone for the organization and sends a message to Council, staff, and the public about your leadership standards.

While social events can be valuable for relationship-building, they come with heightened risks in today's environment:

- **Increased Public Scrutiny:** CAOs and senior leaders are held to higher standards of conduct—even outside business hours. The public, Council, and staff expect behaviour that reflects integrity and professionalism at all times.
- **The Power of Perception:** A casual remark, offhand comment, or overly familiar interaction can easily be misinterpreted or shared out of context—especially when photographed or recorded.
- **Social Media Amplification:** Smartphones and social media mean there's no such thing as "off the record." An informal moment shared publicly can undermine your credibility or damage trust with Council or the community.
- **Equity & Inclusion Considerations:** Jokes, assumptions, or social cues that once went unchallenged can now rightly be seen as exclusionary, inappropriate, or reinforcing power imbalances.

Best Practices:

- **Model Professional Boundaries:** Keep conversations respectful and inclusive. Avoid alcohol overconsumption, gossip, or commentary on Council matters that could be seen as political or biased.
- **Remember Your Audience:** You may be among friends or peers—but you are always the CAO. Conduct yourself with the awareness that others may be watching or reporting back.
- **Be Mindful of Equity Dynamics:** Ensure that everyone feels included and respected. Avoid exclusive gatherings or one-on-one scenarios that could be perceived as favoritism or inappropriate.

CAO Pro Tip: You're Always On

Even in relaxed settings, your words, tone, and behaviour carry weight. Whether you're at a reception or riding the elevator, professionalism builds credibility—and protects you. The best CAOs are authentic, approachable, and trusted—and they never forget that trust is fragile.

Navigating Internal Competition & Building Leadership Credibility

If you are already working in municipal government, competing for the CAO role internally can be both an opportunity and a challenge. The transition from colleague to leader requires strategic positioning and relationship management.

Key strategies include:

- **Demonstrate Leadership Before the Title:** Take initiative in leading projects, mentoring staff, and solving organizational challenges.
- **Foster Trust & Relationships:** Earn the confidence of Council, staff, and stakeholders through consistent professionalism and strong communication.
- **Manage Perceptions & Political Sensitivities:** Recognize that moving into the CAO role may shift workplace dynamics—stay impartial, credible, and focused on the municipality's best interests.
- **Balance Competition with Teamwork:** While positioning yourself as a strong candidate, continue prioritizing collaboration and organizational success.

Whether you are advancing from within or stepping into the CAO role from another sector, establishing credibility, trust, and strategic leadership will set you up for long-term success.

CAO Pro Tip: You're Not Alone—Every Challenge is an Opportunity

Some days as a CAO will be tough - decisions will be scrutinized, challenges will arise, and the weight of leadership may feel overwhelming. But you are not alone. Every CAO faces difficult moments, and every challenge is an opportunity to grow, lead, and make a difference.

Lean on your network. CAMA's Masterminds Forum offers a confidential space for CAOs to share challenges, gain insight from peers, and receive real-time advice from those who understand the pressures of the job. Whether it's navigating a complex political issue, managing a crisis or seeking validation for your next steps, this peer-based support system can be invaluable.

And if you're facing an urgent issue outside the timing of the Masterminds sessions, don't hesitate to reach out to CAMA's National Office. We can help connect you with a fellow CAO – often from outside your region – to offer guidance, share experiences, or simply lend a listening ear. Sometimes that one conversation can make all the difference.

The work is demanding, but you are never alone in it. And the impact you make – as a steady, ethical, and courageous leader – is worth it.

TOP TEN THINGS I WISH I KNEW AS A YOUNGER LEADER

1. **You Can't Lead Alone—Build a Strong Team**

   Success isn't about having all the answers; it's about surrounding yourself with capable people and empowering them. Collaboration, delegation, and trust are essential.

2. **Relationships Matter More Than You Think**

   Governance is about more than policies—it's about people. Invest in relationships with your Council, staff, and community stakeholders. Without trust and strong relationships, achieving results is much harder.

3. **Listen More, Talk Less**

   The best leaders know when to pause, seek input, and truly hear concerns. Solutions aren't just found in data—stories, emotions, and lived experiences hold weight in decision-making.

4. **Think Politically, Act Non-Politically**

   You must remain neutral, but that doesn't mean ignoring the political landscape. Understanding Council members' priorities, fears, and motivations will help you navigate challenges more effectively.

5. **Patience is a Superpower**

   Rushing to solve problems often leads to unintended consequences. Take the time to consult, analyze, and engage key voices before making big decisions.

6. **You Don't Have to Have All the Answers**

   Early in your leadership, you may feel pressure to always be right. The reality? Your strength lies in asking the right questions and making space for others to contribute.

7. **Mistakes Will Happen—Learn From Them**

   You will make mistakes, and so will your team. Instead of fearing failure, create a culture of learning and adaptability. How you respond to challenges will set the tone for your leadership.

8 Boundaries Are Key to Longevity

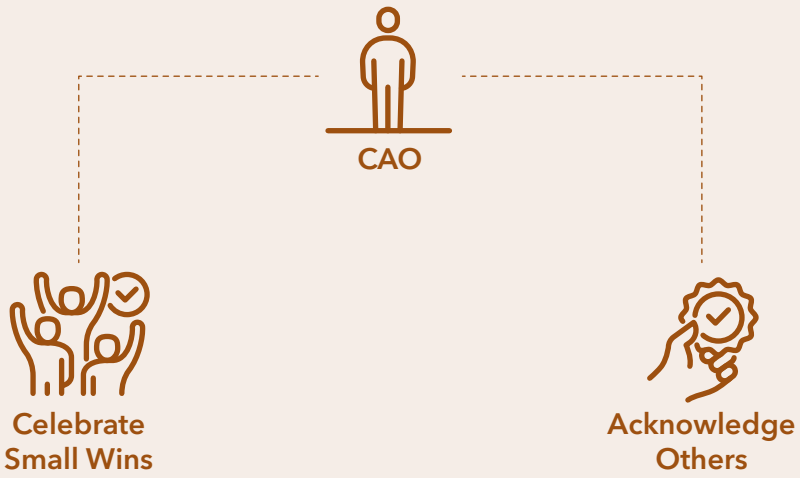
The work will never be "done." Set clear boundaries for your time, well-being, and personal life. Burnout serves no one—not your organization, not your staff, and certainly not you.

9 Your Role is to Shape the Future, Not Just React to the Present

Governing boards change, community issues evolve, but your job is to maintain long-term vision and stability. Be the consistent voice that keeps your municipality focused on the bigger picture.

10 Celebrate Small Wins and Acknowledge Others

Morale matters. Take time to appreciate your team's efforts, recognize progress, and create a culture where success is shared.



KEY TERMS YOU NEED TO KNOW

Before exploring the CAO role, it's important to understand some key municipal terms. These foundational concepts will help you navigate the Toolkit with ease and build a strong understanding of municipal government operations.

For a comprehensive glossary of municipal government terms, including legislative definitions, governance structures, and operational concepts, see **Appendix E**.

Term	Definition
Accountability	The obligation of an individual or organization to account for its activities, accept responsibility, and disclose results transparently.
Budgeting	The process of creating a financial plan that allocates resources for various municipal operations, capital projects, and strategic initiatives.
Bylaws	Local laws and regulations enacted by a municipal Council to govern activities within the community.
Chief Administrative Officer (CAO)	The senior administrative leader responsible for implementing Council policies, overseeing daily operations, and advising elected officials on policy and strategy.
CAO-Council Protocol	A structured agreement outlining the roles, responsibilities, and communication practices between Council and the CAO.
Governance	The framework of rules, practices, and processes that guide decision-making and organizational conduct, emphasizing accountability, fairness, and transparency.
Municipal Act	The legislation that outlines the powers, responsibilities, and governance framework of municipalities in each Province or Territory.
Operational Leadership	The management of daily municipal operations to ensure service delivery aligns with strategic objectives.
Public Accountability Standards	Ethical and procedural benchmarks municipalities follow to ensure transparency, fairness, and responsiveness.
Strategic Planning	The process of defining a municipality's long-term vision, setting priorities, and developing actionable steps to achieve its goals.
Transparency	The practice of openly sharing information, decisions, and processes with stakeholders to build trust and credibility.

UNDERSTANDING LOCAL GOVERNMENT IN CANADA

Local government is where policy meets reality—decisions made in Council Chambers translate directly into services that impact residents' daily lives. While federal and provincial governments set broad legislative frameworks, municipalities are responsible for delivering the essential services that keep communities functioning and thriving.

These services include:

Snow removal and road maintenance that keeps communities safe and functional.

Water and wastewater management ensuring public health and sustainability.

Recreation facilities and public libraries that enrich community life.

Local policing and fire protection for safety and emergency response.

Because of this direct connection to citizens, local governments are the most accessible and visible level of government—and often the most scrutinized.

As a CAO, you are the bridge between governance and operations. Your role is to turn Council's strategic direction into results, while ensuring that day-to-day operations run effectively, transparently, and in alignment with community needs.

This section provides a high-level overview of:

- The structure of local government across Canada and its relationship with federal and provincial levels.
- The CAO's role in governance, policy implementation, and community engagement.
- Key municipal responsibilities including service delivery, financial management, and strategic planning.
- Emerging trends shaping municipalities—such as climate resilience, economic development, and digital transformation.

Whether you're new to municipal administration or transitioning from another sector, understanding how local government functions—and your place within it—is essential to leading with confidence and clarity.

Key Elements of Local Government

Governance Structure

Local governments in Canada operate within a framework defined by provincial or territorial legislation. These laws outline the powers, responsibilities, and limitations of municipalities, providing the legal foundation for local governance. Each Province or Territory has its own *Municipal Act* (or equivalent), which sets out rules regarding governance, planning, finances, and operations.

Note on Municipal Structures: Municipal government structures vary widely across Canada, including single-tier, two-tier, and regional systems depending on the province or territory. While this Toolkit provides national guidance, CAOs are encouraged to consult their provincial legislation (such as the *Ontario Municipal Act*) for specific details related to their local governance framework.

- **CAO-Council Relationship:** The relationship between Council and the CAO is pivotal. Council, comprised of elected officials, sets the strategic vision, policies, and priorities for the municipality. As the CAO, your role is to execute that vision by developing plans, managing resources, and overseeing staff. Building trust, fostering open communication, and ensuring clarity of roles are critical to maintaining a productive CAO-Council partnership.
- **Accountability:** Local governments are held accountable to both the legislation under which they operate and the residents they serve. As a CAO, you will often find yourself at the center of this accountability, ensuring transparency in decision-making and adherence to legal obligations.

Community Focus

Local government is the closest level of governance to residents. It is uniquely positioned to respond to the needs of individuals, businesses, and organizations within the community. This proximity allows municipalities to:

- Tailor services to meet specific local needs, from recreational programming to emergency response.
- Foster collaboration with community stakeholders to address shared challenges, such as housing affordability or infrastructure improvements.
- Serve as a bridge between the public and other orders of government, advocating for the interests of the municipality.

As a CAO, you are the face of this responsiveness. Your leadership will influence not only service delivery but also the perception of the municipality as a trusted and effective institution.

Evolving Responsibilities

Local governments in Canada are increasingly tasked with addressing complex and evolving challenges that require innovative approaches and careful prioritization. As CAO, you must constantly balance "hard" services (e.g. infrastructure, utilities, public safety) with "soft" services (e.g., recreation, culture, social programming) that directly affect residents' quality of life.

Doing more with less-within tight budgets and rising expectations – is often the norm. Your evolving responsibilities may include:

- **Climate Resilience**: Municipalities are on the frontlines of climate adaptation and mitigation, addressing issues such as flooding, wildfire prevention, and sustainable development.
- **Housing and Social Issues:** Affordable housing, homelessness, and social equity are pressing concerns that often fall within municipal jurisdiction.
- **Health Services:** Some municipalities are increasingly being asked to contribute to hospital capital projects and support local physician recruitment efforts.
- **Technological Advancements:** From digital service delivery to smart city initiatives, municipalities must stay ahead of technological trends to enhance efficiency and engagement.
- **Asset Management and Infrastructure Planning:** Municipalities are increasingly required to maintain formal asset management plans that track the condition, replacement timelines, and financial implications of infrastructure such as roads, water systems, facilities, and equipment. Effective asset management supports long-term planning, reduces service disruption risks, and ensures that limited capital dollars are invested wisely. CAOs must work closely with Public Works, Finance, and Planning staff to embed asset management into budgeting, reporting, and strategic decision-making.
- **Economic Development:** Attracting businesses, supporting local entrepreneurship, and fostering economic resilience are key areas where municipalities can make a significant impact.
- **Digital Leadership & Technology Governance.** Digital transformation is no longer optional – it's a strategic leadership issue. As CAO, you will increasingly be expected to guide decisions on digital services, IT structure, and emerging technologies like artificial intelligence. Even without deep technical expertise it's critical to ask:
  - Do we have a digital services strategy?
  - Who leads IT—and do they also oversee privacy, cybersecurity, or data governance?
  - Are we investing in internal capacity or relying on vendors?
  - How are we preparing for AI use, and who's accountable for those choices?

  You don't need to be the tech expert—but you do need to lead on why digital investments matter, how they're governed, and what values they reflect.

CAO Pro Tip: Tech Without Strategy = Risk Without Purpose

Don't wait for an IT crisis to ask tough questions. Align digital tools with your priorities, assign clear accountability, and make sure your solutions serve both your staff and your citizens.

As a CAO, your ability to navigate these evolving responsibilities will position your municipality for long-term success and sustainability.

Information Governance, FOIP, and Privacy Protection

Municipalities across Canada are experiencing increased pressure to manage public information responsibly, transparently, and in accordance with privacy legislation. This includes responding to Freedom of Information (FOI) requests under legislation such as **FOIP (Freedom of Information and Protection of Privacy)** or its provincial/territorial equivalent.

These responsibilities often fall to municipal staff who may not have specialized training, placing additional strain on administrative resources—particularly in small and medium-sized communities.

Key responsibilities include:

- Responding to FOIP requests within legislated timelines and formats.
- Protecting sensitive personal and corporate information in both digital and paper records.
- Ensuring staff awareness and compliance with privacy laws and data-handling procedures.
- Maintaining secure records management systems that support transparency while protecting confidential data.

The CAO plays a key leadership role in ensuring that policies, training, and systems are in place to meet legislative obligations and public expectations.

As information management becomes more complex, municipalities must:

- Invest in training and resources for staff who handle FOIP-related responsibilities.
- Review internal policies on data access, retention, and destruction.
- Proactively communicate with residents about their rights and how information is protected.

CAO Pro Tip: Information is Power–And Responsibility

FOIP isn't just a legal requirement—it's a trust issue. A strong privacy culture protects both your organization and your community. Prioritize transparency, document defensibly, and empower your team with the knowledge to handle sensitive information with care.

ORDERS OF GOVERNMENT IN CANADA

Federal, Provincial and Territorial, and Municipal

Note on Terminology:

Throughout this Toolkit, the term "orders of government" is used instead of "levels of government" to reflect the distinct but complementary roles of federal, provincial/territorial, municipal, and Indigenous governments in Canada. This language emphasizes mutual respect and partnership rather than hierarchy.

In Canada, there are three primary orders of government: federal, provincial and territorial, and municipal. The **Library of the Canadian Parliament** notes:

"The federal government creates laws and manages programs and services that tend to affect the whole country, the provincial and territorial governments have powers to make decisions relating to areas of law that affect their Province and Territory directly, and the municipal order of government is responsible for establishing by-laws and services that are administered in a specific city, town or village."

Important Context on Variability:

While each order of government has typical areas of responsibility, the delivery of specific services can vary significantly across Provinces and Territories. For example, municipalities in Ontario may be responsible for long-term care or social services, whereas these remain under provincial jurisdiction in other Provinces. Municipal responsibilities are shaped by provincial legislation and can differ greatly in scope and complexity.

Furthermore, in some jurisdictions, the provincial or territorial government may download responsibilities to municipalities that were historically handled at the higher order—such as ambulance services, housing, or public health. This trend has increased municipal workloads and financial pressures in certain regions.

CAO Insight: Always refer to your provincial or territorial legislation and service agreements to understand your municipality's actual scope of responsibilities. "Typical" does not mean "universal."

What are the Different Orders of Government Responsible For?

Municipal Government	Provincial/Territorial Government	Federal Government
Municipal Level (or local government) is usually based in a city, town or district. Municipal governments deliver many of the services people use in their daily lives – it is the government closest to the people.	In each of the ten **Provinces** in Canada, the provincial government is responsible for areas listed in the *Constitution Act, 1867*, such as education, health care, some natural resources, and road regulations. Sometimes they are a shared responsibility with the federal government. It is also important to note that the three **Territories** in Canada (Northwest Territories, Yukon Territory, and Nunavut) have their own governments and are granted their powers through federal legislation instead of through the Canadian constitution.	The **Federal** government's responsibilities generally affect the entire country.
Responsibilities	**Responsibilities**	**Responsibilities**
• Agricultural Services • Libraries • Building Permits and Zoning • Recreation, Parks and Playgrounds • Arts and Culture • Water and Sewer Services • Police Services • Fire Services • By-law Enforcement • Roads and Sidewalks • Parking • Licensing and Animal Control • Public Transportation • Planning and Development • Economic Development • Collection of Garbage and Recycling • Property Taxes (municipal portion) • Social Services • Long Term Care	• Highways • Education • Healthcare • Social Services • Tourism (Provincial) • Environment • Agriculture • Provincial Governance and Administration which includes the legislature, provincial treasury, and local government • Provincial Taxes • Property Taxes (provincial portion) • Marriage • Provincial Courts and Prisons	• Post Office • Border Services, Immigration and Citizenship • Foreign Affairs and Policy • RCMP and Military • Income Taxes and Employment Insurance • Social Security • Industrial Relations • International Trade • Banking, Trade and Commerce • National Defense • Employment Insurance • Federal Taxes • Correctional Facilities and Supreme Court

Indigenous Governments: Working in Partnership with First Nations, Métis, and Inuit Communities

Indigenous Peoples have lived on this land since time immemorial. Today, many municipalities operate on the traditional and unceded territories of First Nations, Métis, and Inuit communities. As a CAO, your leadership plays an important role in recognizing these relationships, addressing past injustices, and helping to build more respectful, inclusive governance systems.

Recognizing Indigenous Governments as Equal Partners

Indigenous governments—whether First Nations, Métis Settlements, or Inuit communities—are distinct orders of government with their own jurisdictional authority, laws, and governance systems. These governments are not stakeholders or add-ons to the municipal process—they are sovereign partners. Some Indigenous governments operate under the Indian Act, while others exercise self-government or modern treaty rights that define nation-to-nation relationships with Canada.

Do not assume uniform titles or governance models. Indigenous leaders may hold titles such as Chief, Councillor, President, Grand Chief, or Elder, depending on the community and governance structure. These are not interchangeable with municipal titles like Mayor or Councillor. Ensure that correspondence, protocols, and engagements reflect these distinctions. Take time to learn and use correct titles and forms of address when working with Indigenous governments.

Key Principle: The relationship between municipalities and Indigenous governments must be based on respect, trust, and a recognition of inherent rights—not on assumptions of hierarchy or assimilation into municipal processes.

Municipal-Indigenous Collaboration in Practice

Even if your municipality does not currently share boundaries or deliver joint services with an Indigenous government, you can—and should—take proactive steps to acknowledge, engage, and build trust. This is particularly important given the long history of systemic exclusion and marginalization of Indigenous peoples, which continues to affect levels of trust in government today.

Consider the following approaches:

- **Acknowledge Traditional Territory:** Begin Council meetings and public events with a land acknowledgment that respects the Indigenous peoples on whose land your community operates. Ensure it is meaningful, researched, and not formulaic.
- **Invite Indigenous Voices to the Table:** Consider inviting an Elder to speak at a Council meeting or having a community Elder serve in an advisory role to the municipality on matters of protocol and engagement.
- **Build Informal Relationships:** Before pursuing formal agreements, invest time in relationship-building with Indigenous leadership and administration. Attend cultural events, reach out for shared learning opportunities, and engage with sincerity.
- **Engage Early and Respectfully on Shared Interests:** If land use planning, economic development, emergency management, or infrastructure projects affect Indigenous communities, engage at the earliest stage. Respect protocols and ensure communication is reciprocal and sustained.
- **Support Truth and Reconciliation:** Respond to the Calls to Action of the Truth and Reconciliation Commission by embedding reconciliation goals into municipal policies, training, and partnerships. This includes cultural competency training for staff and Council.

Make Training a Standard Part of Onboarding

Cultural competency training and Indigenous relations education shouldn't be seen as extras—they are essential leadership tools. Consider making them a required component of CAO onboarding, especially in communities where relationships with Indigenous governments are active or evolving. Embedding this learning early helps avoid missteps, supports respectful engagement, and demonstrates a commitment to truth and reconciliation through action—not just policy.

Jurisdictional Realities & Collaboration

Some Indigenous governments, especially in the northern territories, have governance frameworks and agreements that position them similarly to provincial or territorial governments. Others work with municipalities through service agreements (e.g., water, roads, emergency services), or partner on regional planning and economic development.

Important: Do not assume that Indigenous communities want or need integration into municipal systems. Respect their governance, decision-making structures, and right to self-determination.

CAO Pro Tip: Respect is a Practice, Not a Policy

Building a relationship with Indigenous governments takes time and humility. Start with listening. Acknowledge the part. Be open to new protocols, perspectives, and ways of knowing. The goal isn't to lead it's to walk beside.

Intergovernmental Relations: Navigating Partnerships & Advocacy

As a CAO, you play a key role in managing relationships across all orders of government. Whether seeking funding for infrastructure projects, coordinating services with provincial ministries, or advocating for your community's needs, **intergovernmental relations are a critical leadership function**.

Strong intergovernmental relationships are built on professionalism, persistence, and an understanding of jurisdictional roles. They require strategy, diplomacy, and proactive engagement—especially as responsibilities and expectations continue to shift toward municipalities.

Key Intergovernmental Functions of the CAO:

- **Funding & Program Navigation**

  Municipalities rely on Federal and Provincial/Territorial grant programs to support capital projects, housing, transit, and climate adaptation. CAOs must:

  - Stay informed of application deadlines and eligibility criteria.
  - Build internal capacity to respond to short turnaround times.
  - Align projects with broader government priorities to increase success.

- **Advocacy & Policy Influence**

  CAOs often advocate on behalf of their community through:

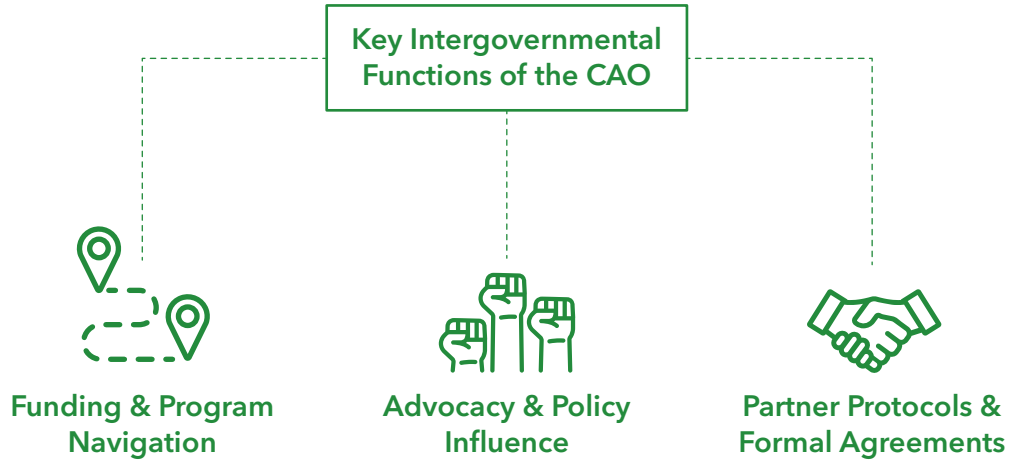
  - Submissions to Ministers or Deputy Ministers.
  - Participation in provincial working groups, associations (e.g., CAMA, FCM, Provincial/Territorial Associations), or policy consultations.
  - Preparing briefing notes or supporting elected officials in advocacy efforts.

- **Partner Protocols & Formal Agreements**

  Establishing clear protocols for shared services, infrastructure, or jurisdictional overlap is essential. These may include:

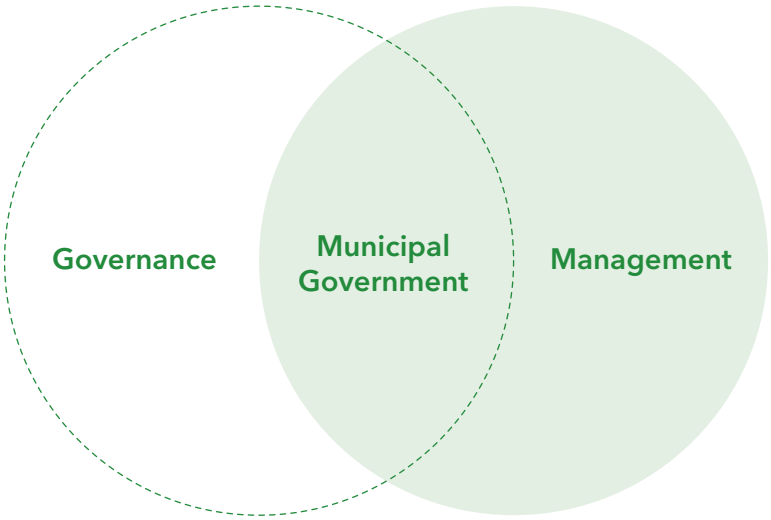
  - Intermunicipal service agreements.
  - Protocol agreements with Indigenous governments.
  - MOUs with provincial departments or Crown corporations (e.g. utilities, transportation agencies).

CAO Insight: Maintain a professional, non-partisan stance in all intergovernmental communications. You are representing the municipality's interests – not a political agenda.



ROLES AND RESPONSIBILITIES OF LOCAL GOVERNMENT

Municipal government involves both governance and management. The principal role of elected officials is to govern—by setting strategic direction, adopting policies, and making decisions in the public interest. The principal role of staff, under the leadership of the CAO, is to manage—by implementing Council's direction, overseeing operations, and delivering services.



Council

The Council of your municipality is comprised of members who have been elected by your citizens. They may be elected by Ward (divided by districts) or at large (across the entire municipality) depending on the system your local area and Province/Territory utilizes.

The primary role of a Council member is that of **governance**. Council sets the strategic direction of your community and is responsible for the oversight and guidance of the entire organization. It is important to note that individual Councillors do not have decision making authority. All powers of a municipality are made by Council as a whole and each Councillor has one vote. Even though some Councillors have been elected for specific areas of the community and their role is to voice the concerns of the residents they serve, they govern strategically for the entire municipality.

Some of the major responsibilities of the Council as a whole are articulating the long-term vision of the community, including establishing and enforcing by-laws, adopting a strategic plan, setting overall service levels and programs that are delivered to citizens, leading land use planning, encouraging growth and sustainability, approving operating and capital budgets, and setting property tax rates – just to name a few.

Understanding the Roles of Mayor, Warden and Reeve in Canadian Municipalities

Mayor

A Mayor is elected at large by all voters in a municipality and serves as the head of Council. One of their key responsibilities is to preside over Council meetings, ensuring that they are conducted efficiently, respectfully, and in accordance with the municipal procedural bylaw.

The Mayor also serves as the primary public representative of the municipality. They:

- Act as a spokesperson to the media (unless delegated),
- Represent the municipality at official functions and intergovernmental meetings,
- Engage with businesses and community organizations,
- Attend ceremonies and events on behalf of Council.

Understanding the Mayor's Role and Limits

While the Mayor often has a high public profile and carries significant ceremonial and political responsibilities, it is important to recognize that the Mayor is not the municipality's CAO. Rather, they are "first among equals" on Council. This means:

- The Mayor cannot unilaterally make decisions on behalf of Council.
- They do not have the authority to direct staff, including the CAO, except through formal resolutions of Council.
- Their influence comes from leadership, collaboration, and relationship-building—not executive power.

In most Canadian jurisdictions, municipal governance is collective: decisions must be made by Council as a body through majority vote, and no individual—including the Mayor—has authority outside of that framework.

Emergency Powers

One exception is during emergencies. In many Provinces and Territories, the Mayor (or Reeve/Chair) has the authority to declare a local state of emergency under applicable emergency management legislation. This power is typically exercised in consultation with the CAO and emergency management personnel and enables the municipality to access extraordinary powers to protect public safety and respond quickly to crises.

Note on Legislative Variance

In certain jurisdictions (e.g., Ontario), "Strong Mayor" legislation has introduced expanded powers for the Mayor in specific municipalities. These powers may include the ability to propose budgets, appoint senior staff, or veto by-laws under prescribed conditions. If you are serving in such a municipality, it is essential to understand the specific legislative framework that applies and how it may alter the typical balance between governance and administration.

Reeve

A Reeve is the head of Council in some Canadian municipalities, particularly in smaller towns, rural municipalities, and townships - most commonly in Ontario, Alberta, Saskatchewan, and Manitoba. The title "Reeve" is largely historical and functionally similar to that of a Mayor.

- In most Provinces today, Reeves are directly elected by voters, just like Mayors.
- The responsibilities of a Reeve are virtually identical to those of a Mayor: chairing Council meetings, representing the municipality at official functions, acting as a spokesperson, and providing leadership to Council.
- Some municipalities may use the title "Reeve" instead of "Mayor" as a matter of tradition, local preference, or historical continuity.

Warden or Chair

A Warden or Chair is the head of Council for an upper-tier municipality, such as a county or regional government, primarily found in Ontario and parts of Atlantic Canada (e.g. Nova Scotia). While the title and selection process vary, both positions serve similar functions in chairing Council and representing the upper-tier municipality.

- Warden is the traditional title used by counties and some rural regional governments, especially in Ontario and Atlantic Canada.
- Chair is more common in urban or suburban regional municipalities in Ontario (e.g., Durham Region, Peel Region), and may also be used in certain specialized governance structures.

Selection:

- Wardens and Chairs are typically elected by fellow members of Council, not directly by the public—although some regions (e.g. Peel Region) have adopted direct election models for the Chair.
- Term lengths vary by municipality, ranging from one to four years. Many municipalities elect a Warden for one-year terms, allowing for rotation, though re-election for consecutive terms is common.

Role:

- Both act as a "leader of leaders," chairing upper-tier Council meetings, representing the municipality at official functions, and serving as the chief political spokesperson.
- Since the Warden or Chair is also an elected representative from a lower-tier municipality, the CAO must maintain equity and impartiality to avoid the perception of preferential treatment. It is the role of the CAO to safeguard governance boundaries and uphold the integrity of regional decision-making.
- Selection practices may be influenced by seniority, experience, or rotational policies, as defined in the municipality's procedural bylaw or local custom.

Key Differences in Head of Council Roles in Canadian Municipalities

Title	Mayor	Reeve	Warden or Chair
Definition	Head of Council in most Canadian municipalities.	Head of Council in smaller towns, rural municipalities, and townships—most commonly in Ontario, Alberta, Saskatchewan, and Manitoba.	Head of Council for an upper-tier municipality (e.g. county or regional government).
Elected By	Voters at large (public election).	Voters at large (public election).	Typically elected by fellow Council members (internal selection); some are directly elected by the public.
Term of Office	Usually four years, aligned with Council term.	Usually four years, aligned with Council term.	One to four years determined by the municipality's Procedure Bylaw.
Primary Role	Chairs meetings, provides leadership, represents the municipality, acts as chief spokesperson.	Functionally identical to a Mayor; role is historical/traditional.	Acts as a "leader of leaders"—chairs Council, represents the region, and serves as chief political spokesperson.
Unique Considerations	In most jurisdictions, acts as "first among equals"; cannot act unilaterally. Some provinces (e.g. Ontario) have enacted Strong Mayor legislation granting additional powers in specific municipalities.	Some municipalities use the title "Reeve" instead of "Mayor" by local preference or tradition.	CAOs must ensure equitable treatment of all lower-tier municipalities – preferential access to the Warden's or Chair's home municipality.
Common In	All Provinces.	Ontario, Alberta, Saskatchewan, Manitoba (especially rural and smaller municipalities).	Ontario (upper-tier counties/regions), Nova Scotia, and parts of Atlantic Canada .

Case Study: Navigating Varying Leadership Styles – A CAO's Perspective

A seasoned CAO transitioned into a mid-sized municipality and worked under two very different Mayors—one who was hands-off and trusted administration fully, and another who was highly involved, frequently challenging recommendations and inserting themselves into operational matters. Adapting to each leadership style was key to maintaining effective governance.

Approach & Lessons Learned:

Working with a Hands-Off Mayor:

- **Proactive Communication** – Since the Mayor wasn't deeply engaged in operational details, the CAO ensured Council received regular, concise updates to keep them informed.
- **Strategic Check-Ins** – Monthly one-on-one meetings helped maintain alignment and ensure the Mayor remained confident in the administration's direction.
- **Empowering Council** – Without strong direction from the Mayor, the CAO focused on ensuring Council had the tools to make well-informed decisions collectively.

Working with a Highly Involved Mayor:

- **Setting Boundaries** – The CAO clarified the CAO's role in operations versus Council's governance responsibilities, reinforcing the CAO-Council framework early.
- **Structured Decision-Making** – Formal processes were emphasized to ensure that decisions were based on strategic priorities rather than personal preferences.
- **Consistent Documentation** – Written records of discussions and direction helped maintain accountability and clarity when the Mayor's involvement blurred governance lines.
- **Council-Wide Communication** – Extra care was taken to ensure that all members of Council were equally informed and actively engaged in decision-making. The CAO reinforced that they take direction from Council as a whole, not individual members. Democracy requires adherence to this fundamental tenet of collective governance.

Key Takeaways for New CAOs:

- Adaptability is key—each leadership style requires a different approach to maintain a productive working relationship.
- Set clear expectations early, ensuring the Mayor understands the CAO's role and responsibilities.
- Clarify accountability – the CAO is responsible to Council as a whole, not to any individual member, including the Mayor. Reinforcing these early supports balanced, democratic decision-making.
- Maintain professionalism and focus on governance, not personalities—successful CAOs manage relationships while upholding municipal best practices.

CAO Pro Tip: Be mindful of both over- and under-communicating. While regular updates can foster trust, excessive messaging may overwhelm Council or blur governance boundaries. Consider weekly summaries, scheduled briefings, or structured Council dashboards to provide consistent, digestible updates without overloading your elected officials.

Through these approaches, the CAO successfully navigated both leadership styles while ensuring municipal operations remained efficient, professional, and aligned with strategic goals.

Chief Administrative Officer

Most municipalities employ a Chief Administrative Officer who serves as the most senior staff member in the organization. In many jurisdictions, the CAO is the only direct employee of Council, although in some Provinces, legislation allows for Council to directly appoint additional officials such as a Clerk or Solicitor.

The CAO is responsible for the management of staff and the day-to-day operations of the municipality, guided by the strategic direction and policies set by Council. Hiring a qualified CAO is one of the most important decisions a Council can make to ensure effective municipal leadership.

In some smaller municipalities, the role of the CAO may be fulfilled by a Clerk, Treasurer, or a combined administrative role, depending on the structure and capacity of the organization.

The CAO also serves as Council's key advisor, providing objective analysis and recommendations to support evidence-based decision-making. This role requires political acuity, strong communication skills, and adaptability, particularly when working with newly elected Councils or during periods of change.

It is important to emphasize that:

- The CAO receives direction from Council as a collective body, not from individual members.
- It is not appropriate for individual Councillors to direct or influence municipal staff. Any staff-related concerns or requests should be communicated through the CAO.
- The CAO, in turn, is responsible for ensuring that Council's decisions are implemented and that staff are supported and accountable in delivering municipal services.

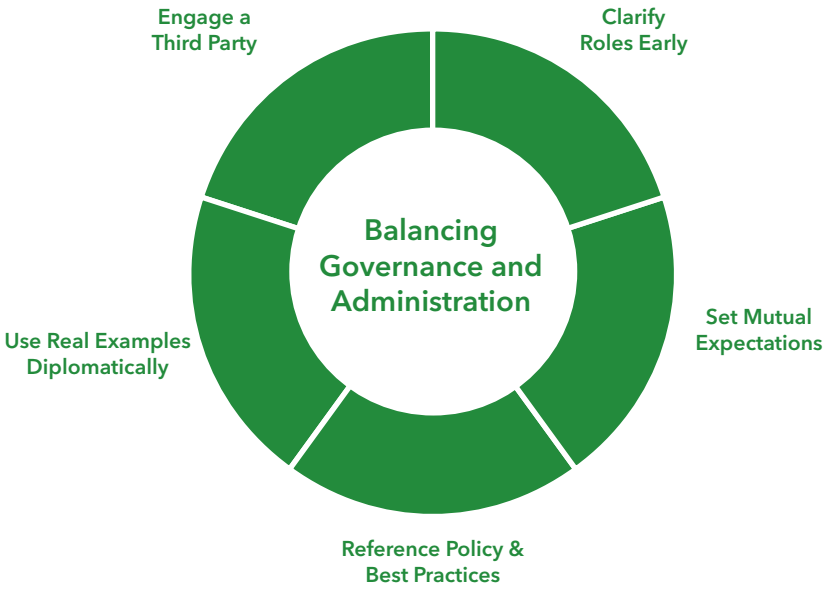
CAO Pro Tip: You serve one employer—Council as a whole. Stay grounded in governance protocols and reinforce proper channels to protect staff, maintain neutrality, and preserve effective CAO-Council relations.

Case Study: Addressing Council's Involvement in Operations

A CAO faced a Mayor and Council who frequently overstepped into operational matters, blurring the lines between governance and administration. To address this, the CAO took a strategic approach:

- **Clarified Roles Early:** Used orientation sessions and ongoing discussions to reinforce governance versus administration responsibilities.
- **Set Mutual Expectations:** Facilitated conversations to establish what Council expects of the CAO – and vice versa – as well as expectations between the Mayor and Council members themselves.
- **Referenced Policy & Best Practices:** Cited municipal bylaws, policies, and governance frameworks to guide discussions.
- **Used Real Examples Diplomatically:** Highlighted how over-involvement slowed efficiency and created operational challenges.
- **Engaged a Third Party:** Brought in a governance expert to provide neutral guidance on Council's role.

A proactive, professional approach—grounded in policy, education, and diplomacy—helps reinforce role clarity while maintaining positive relationships.



Managing Ongoing Council Interference

While most Councillors respect the CAO's role, there may be repeat instances of overreach from individual members. Persistent interference—such as giving direction to staff, demanding priority access, or blurring administrative and political lines—requires calm, consistent boundary-setting.

Document these interactions professionally. Refer to Council's Code of Conduct, Procedure Bylaw, and the CAO's job description or Governance Policy. Always redirect instructions through the proper channels and reinforce that operational matters flow through the CAO.

If behaviour persists, escalate respectfully. Use your Mayor as a partner or request a closed Council session to clarify boundaries collectively. Some CAOs also find it useful to bring in a third party (e.g. governance facilitator or legal counsel) to reinforce good governance practices.

CAO Pro Tip: Stay neutral—but don't stay silent. Silence may be interpreted as acceptance. Repeating consistent, non-defensive messaging like "I'll bring that forward to Council as a whole" helps depersonalize conflict while reinforcing your role.

Municipal Departments

The organizational structure for each community will differ depending on the size and their responsibilities, however, below is a list of the most common departments of a municipality. CAMA developed a "**Toolkit for Effective CAOs – The Right Questions to Ask**" and included are some sample questions to ask to learn about each Division and Department of the City.

Divisions and Departments of the City		
• Information Technology	• Building Inspection	• Tourism
• Financial Services/Treasury	• Building Services	• Fire
• Human Resources	• Fleet	• Public Safety Communications/Dispatch Services
• Compensation and Benefits	• Engineering Services	• By-law Enforcement
• Office of the City Solicitor/Legal	• Parks and Trees	• Police
• Office of the City Clerk	• Water and Sewer	• Social Services
• 311/Service Centre	• Roadway Operations	• Long Term Care
• Corporate Communications	• Transit	• Library Services
• Planning and Development	• Parking Services	
	• Recreation, Culture and Community Development	

The Role of Municipal Staff

Each municipality has its own unique organizational structure, influenced by its size, services, and governance model. In most cases, Directors or Commissioners report directly to the Chief Administrative Officer (CAO), while managers, supervisors, and frontline staff report through those departmental leaders.

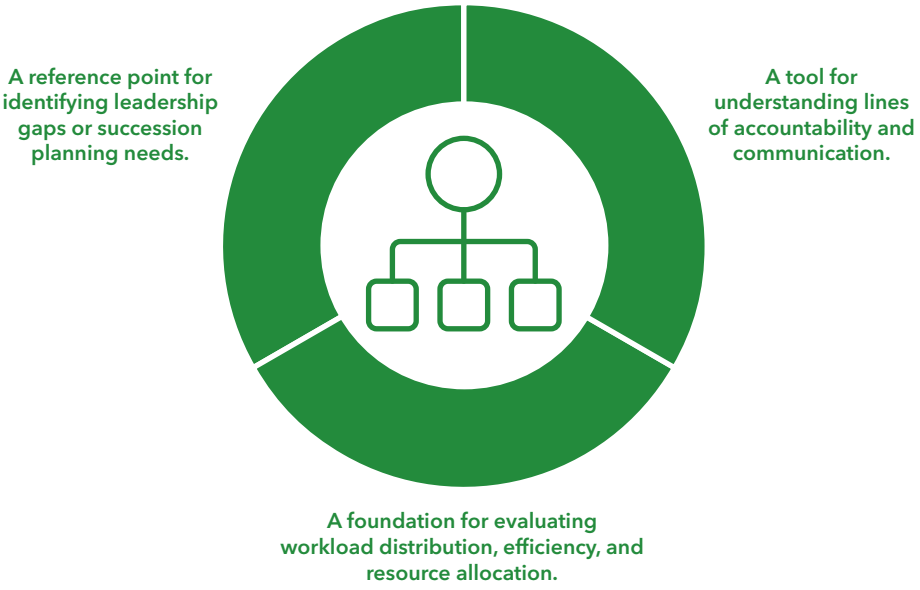
Every role within the organization contributes to the municipality's overall success. From road maintenance to recreation programming, planning to public safety, each staff member plays a critical part in building communities that are safe, healthy, and prosperous.

Why Organizational Charts Matter

Organizational charts are more than a visual of reporting relationships—they are a snapshot of how your municipality operates. For a CAO, they serve as:

- A tool for understanding lines of accountability and communication.
- A reference point for identifying leadership gaps or succession planning needs.
- A foundation for evaluating workload distribution, efficiency, and resource allocation.

Charts also help new staff and Council members understand the structure of the organization and the flow of decision-making authority.



One Size Does Not Fit All

Organizational structures differ widely depending on the size and complexity of the municipality. These differences are also influenced by urban versus rural settings and how core administrative functions – like the Office of the Clerk – are structured.

- **Extra Small Municipalities** may operate with only a handful of staff, where the CAO (or Clerk-Treasurer) oversees multiple service areas directly and works very closely with Council. Staff often serve in multi-functional roles with minimal layers of hierarchy.
- **Small Municipalities** may have a flatter structure, with fewer staff members wearing multiple hats, and the CAO closely involved in daily operations.
- **Medium-Sized Municipalities** often have departmental Directors or Managers reporting to the CAO, with more defined functional areas.
- **Large Municipalities** typically have multiple layers of leadership (e.g., Commissioners, General Managers), with specialized departments, strategic branches, and broader oversight responsibilities.
- **Upper-Tier Municipalities** (such as counties or regional governments) provide services across several lower-tier municipalities and are typically led by a Warden. Their Councils are generally comprised of elected officials from the lower-tier municipalities. Their organizational structure includes departments focused on services that benefit from economies of scale, such as regional roads, health and social services, and paramedic services.
- **Lower-Tier Municipalities** operate within a two-tier structure and are led by a Mayor or Reeve. They deliver local services such as water distribution, local roads, recreation, and bylaw enforcement. Their elected officials may sit on the upper-tier Council.

Sample Organizational Charts

The following sample organizational charts represent three different municipality sizes: small, medium, and large. They are provided for **informational and illustrative purposes only**—not as prescriptive models.

While these charts are based on real-world structures, **municipality names, logos, and individual staff names have been removed** to protect privacy and to provide a more general reference.

These visuals are intended to:

- Offer a glimpse into the varied reporting relationships and functional divisions by municipal size.
- Help new or aspiring CAOs understand typical role groupings.
- Support organizational reviews, redesigns, and succession planning discussions.

Each municipality will—and should—adapt its own structure to reflect its priorities, budget, and community needs.

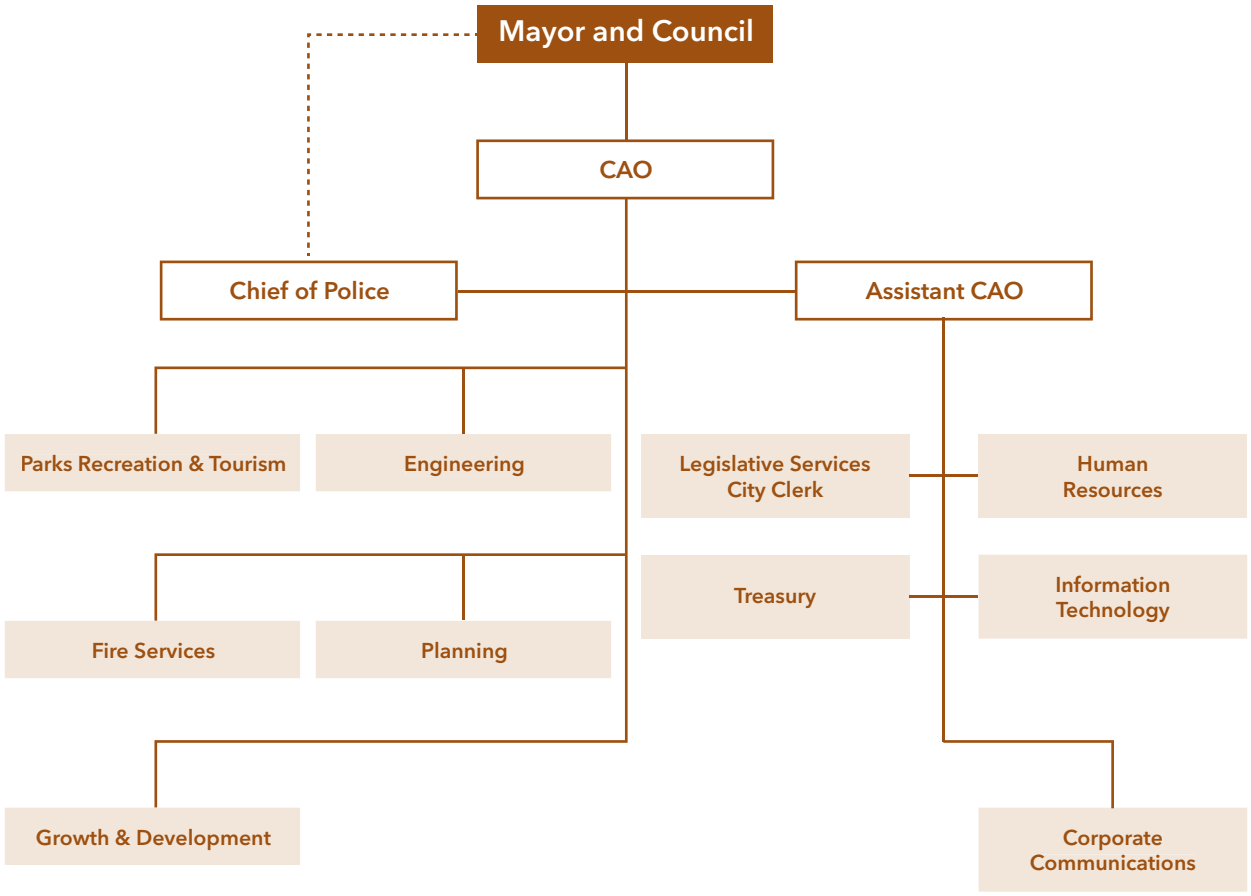
Tips for Reviewing or Redesigning Your Organizational Chart

- Ensure your structure aligns with your strategic priorities and service delivery model.
- Review reporting relationships to avoid bottlenecks or silos.
- Consider whether the structure enables clear communication and accountability.
- Regularly update the chart to reflect personnel or departmental changes and designate a department or position to take ownership of maintaining it.
- Use it as a tool in succession planning and onboarding.
- Apply the RASCI process to clarify roles and responsibilities across your organization—**see Appendix "C"** for a detailed guide and sample templates.

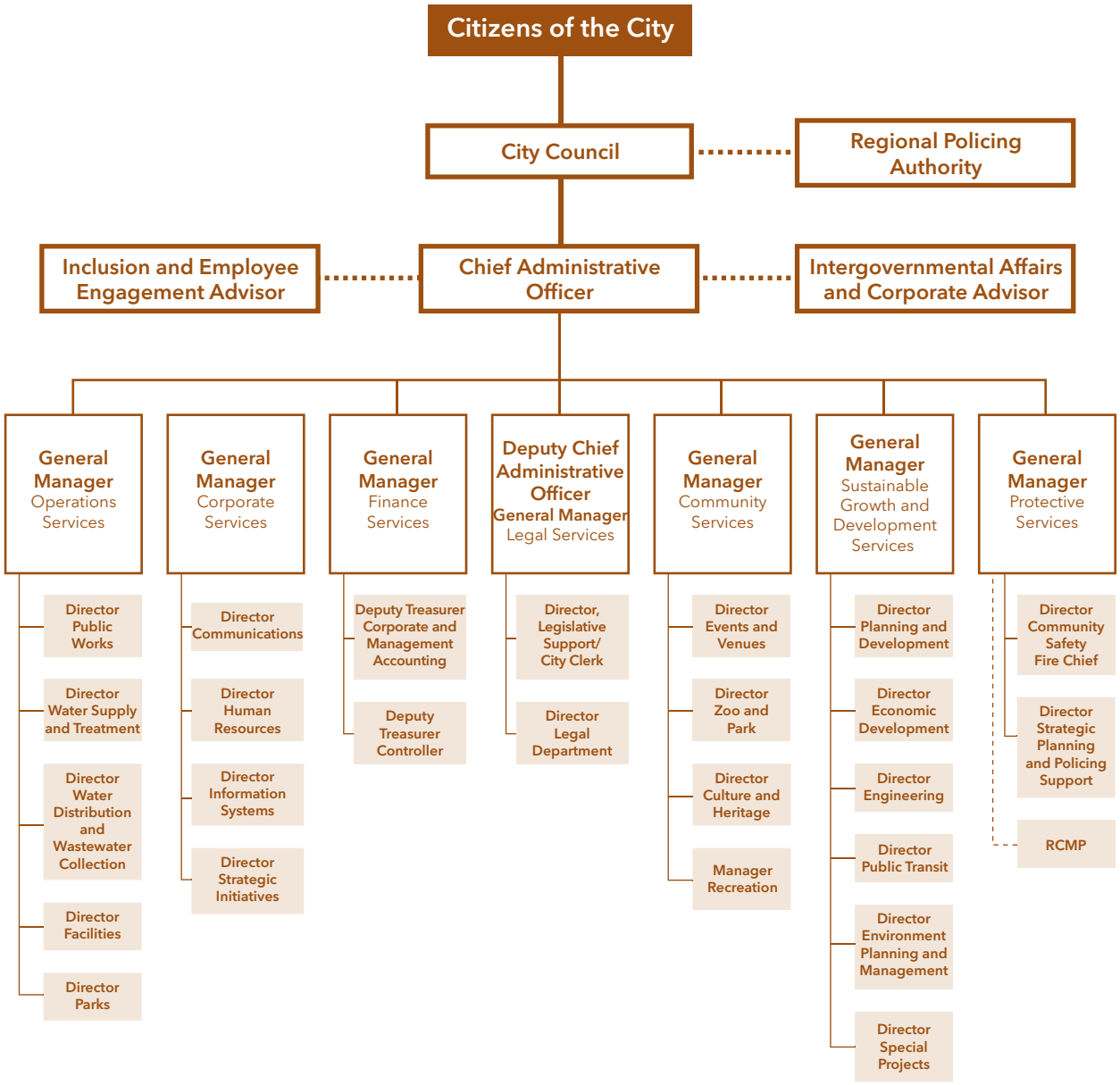
Questions to Ask About Your Organizational Structure

1. Does our current structure support our strategic goals?
2. Are roles and reporting relationships clear to staff and Council?
3. Where do decisions get delayed or communication break down?
4. Are there gaps in leadership or overextended departments?
5. Do staff at all levels understand how their role fits into the bigger picture?

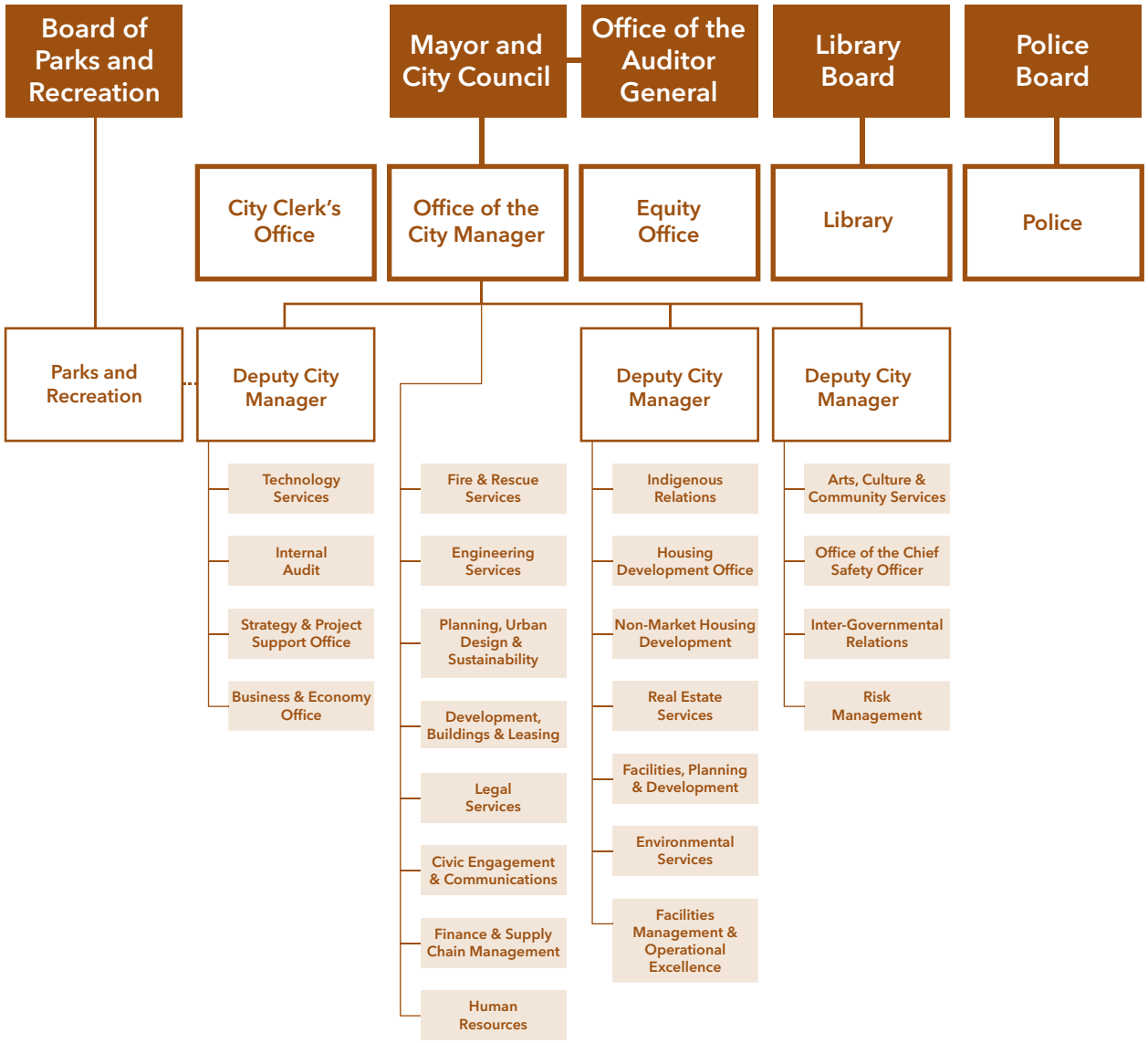
ORGANIZATIONAL CHART FOR A SMALL MUNICIPALITY (UNDER 20,000 RESIDENTS)



ORGANIZATIONAL CHART FOR A MEDIUM-SIZE MUNICIPALITY (75,000 RESIDENTS)



ORGANIZATIONAL CHART FOR A LARGE-SIZE MUNICIPALITY (700,000 RESIDENTS)



The Role of Citizens

Improving the quality of life of its citizens is at the heart of all communities. Citizens want to engage with their local government. They want to be able to share their views (positive or negative) and access channels to participate in the decision-making process of government, connect with their elected officials, and be assured that their input has been heard. Municipalities strive to improve their transparency and communication to simplify how they interact with citizens.

Meaningful Citizen Engagement: Listening, Responding, and Leading with the Public in Mind

Whether or not you ask for it, citizens will tell you what they think. Listening with respect and responding with transparency are key to building public trust. As CAO, you are not just managing the organization—you are stewarding the municipality's relationship with its citizens.

In today's environment, the public expects to be heard, included, and kept informed. This means your leadership must extend beyond internal operations and Council Chambers. You are also helping to shape the municipality's reputation and credibility in the eyes of the community.

Key Considerations for Effective Public Engagement:

- **Be Proactive, Not Just Reactive:** Don't wait for complaints. Use town halls, pop-up booths at community events, open houses, or "rink chats" to hear what matters to citizens before issues escalate.
- **Create Clear Channels:** Ensure there are accessible, consistent ways for the public to ask questions, submit feedback, and receive responses—online and offline. Clarify what Council handles versus what staff can assist with.
- **Equip Council:** Council members are often the first point of contact for citizen concerns. Providing talking points, Q&A documents, and service request protocols helps them respond appropriately without stepping into operational roles.
- **Acknowledge, Even If You Can't Agree:** A well-worded "thank you for your input" goes a long way. Let people know they were heard and explain the process—even if the outcome isn't what they hoped.
- **Use Data Thoughtfully:** Community surveys, engagement platforms, and analytics can offer valuable insights. Share the results transparently and use them to guide Council discussions.

Taking a Strategic Approach to Public Engagement

As CAO, your role is not just to respond to public feedback—but to help shape how your organization gathers, analyzes, and uses it. Before selecting any software or engagement platform, ask: Has Council approved an overall engagement strategy? Are there clear policies on data collection, privacy, and public reporting? Who owns the data? Effective engagement requires more than technology, it requires leadership, intentional design, and internal alignment. A good strategy makes sure the loudest voices don't drown out others, and that resident feedback informs decision-making.

Alignment with CAO Role

Citizen engagement doesn't mean promising what you can't deliver. It means fostering dialogue, setting expectations, and translating public concerns into clear information for Council consideration. By modelling respectful, informed, and timely communication, you help reinforce the municipality's legitimacy and responsiveness.

Policy and Strategic Direction Versus Day-to-Day Operations

As noted above, **Council governs while staff manages**. Council must collectively hold the CAO accountable for the effective management and implementation of the strategic direction of the municipality, while staying out of running the operations. This can be challenging for the elected officials when they are faced with complaints from citizens.

A best practice to support this governance model is annual goal setting between Council and the CAO. This process helps establish shared priorities, reinforces Council's strategic role, and provides a clear framework for evaluating the CAO's performance without crossing into day-to-day management. See **CAMA's Leadership Guide for Effective CAO-Council Relations**.

CAO Pro Tip: Don't assume alignment—create it.

Early in your tenure, take time to clarify Council's expectations, both collectively and with the Head of Council. Proactive conversations about roles, communication preferences, and boundaries help prevent misunderstandings and establish mutual respect. Schedule regular check-ins with the Head of Council to reinforce alignment and maintain a constructive tone, especially during challenging times.

READY TO LEAD? WHAT TO KNOW BEFORE BECOMING A CAO

Stepping into the role of Chief Administrative Officer (CAO) is a defining career moment – one that demands more than technical expertise. As the critical bridge between Council, staff, and the community, a CAO must balance political dynamics, operational realities, and community expectations while leading with confidence and diplomacy.

This section outlines what it takes to succeed as a CAO, how to assess your readiness, and key steps to prepare for this demanding but rewarding role.

SELF-ASSESSMENT: ARE YOU READY FOR THE CAO ROLE?

Becoming a CAO is a high-stakes leadership role that demands strategic thinking, resilience, and political acumen. Before stepping into this position, assess your readiness to ensure you are fully prepared.

Self-Assessment Checklist: Key Readiness Factors

Ask yourself the following questions to determine if you are prepared:

- **Governance & Political Acumen**
  - Do I fully understand the role of a CAO versus that of elected officials?
  - Am I comfortable providing unbiased advice, even when unpopular?
  - Can I navigate Council dynamics, particularly when members have conflicting priorities?
- **Leadership & Decision-Making**
  - Have I successfully led teams through change and uncertainty?
  - Am I prepared to make tough decisions with limited information?
  - Can I manage crises while maintaining composure?
- **Resilience & Emotional Intelligence**
  - Do I have strategies for managing stress and avoiding burnout?
  - Am I emotionally prepared for public scrutiny and criticism?
  - Do I have a strong professional support network for guidance?
- **Municipal Governance & Operations**
  - Do I fully understand the CAO-Council relationship and my advisory role?
  - Can I manage budgets, asset planning, human resources, and legislative compliance?
  - Am I comfortable being the public face of the municipality during crises?
- **Personal & Professional Fit**
  - Does this role align with my long-term career and personal values?
  - Am I prepared for the work-life balance challenges of being a CAO?
  - Do I have a strong employment contract to protect my interests?

Action Step: If you answered "no" to multiple questions, consider building these skills further before stepping into the CAO role.

Building a Strong Foundation for CAO Success

A successful CAO career requires both achievement and preparation. Set yourself up for success by:

- **Developing a Strong Support Network** – Connect with mentors, peer CAOs, and professional associations like CAMA.
- **Investing in Professional Development** – Strengthen expertise in governance, finance, and leadership through targeted training, such as CAMA's Executive Leadership Program.
- **Gaining Practical Experience** – Shadow a CAO, participate in municipal boards, or engage in leadership roles within local government.

Getting Close to the Action: A Front-Row Seat to the CAO Role

One of the most effective ways to prepare for the CAO role is to immerse yourself in it — not by title, but by proximity. If you are an aspiring CAO and working in a municipality, consider asking your current CAO if you can be seconded to their office for a period of time — even just a few hours a week over six months — while still fulfilling your current responsibilities. Sitting just outside the CAO's office or supporting key files gives you a front-row seat to the real, often unseen demands of the job. You will observe political dynamics, crisis navigation, strategic decision-making, and the nuance of Council relationships — none of which are fully captured in job descriptions. You will have a deeper understanding of what a CAO does — and endures. Proximity breeds insight, and insight breeds readiness.

- **Enhancing Personal Resilience** – Develop stress management and self-care strategies to maintain work-life balance.
- **Honing Core Communications Skills** – Build confidence in public speaking and professional writing – essential tools for leadership presence and effective communication with Council, staff, and the community.

CAO Pro Tip: CAO readiness is about preparation, not perfection. With strategic preparation and a strong network, you will position yourself for long-term success.

A Day in the Life of a CAO

The role of a Chief Administrative Officer (CAO) is both dynamic and demanding. From early-morning briefings to late-night Council meetings, a CAO's day is filled with decisions that shape the community's future. As the vital link between Council, staff, and residents, they balance political expectations, operational leadership, and community engagement.

This case study offers a real-world glimpse into a CAO's daily responsibilities—leading strategy discussions, managing crises, and driving economic development. It highlights how CAOs navigate competing priorities, build relationships, and ensure smooth municipal operations while maintaining a long-term vision.

A Day in the Life of a CAO

Note: This snapshot reflects the experience of a CAO in a mid- to large-sized municipality. While the responsibilities and issues may be similar across communities, the pace and intensity can vary widely depending on the size, structure, and complexity of the organization.

At **6:30 a.m.** Sarah scans the morning news and social media with her coffee, keeping an eye on local developments and provincial policies that may impact the municipality. An email from the Mayor alerts her to a hot-button issue gaining public attention—a proposed development that has sparked community debate.

By **8:00 a.m.** Sarah is in the office reviewing the day's agenda with her Executive Assistant. The first order of business is a leadership team meeting where department heads provide updates on key projects—roads and infrastructure, economic development, and emergency preparedness. Sarah reinforces the importance of service delivery metrics, ensuring municipal operations remain efficient and resident focused.

During a **9:30 a.m.** strategy session, Sarah meets with Council members. One Councillor is advocating for increased transit funding, while another is focused on downtown revitalization. Sarah guides the discussion, presenting data-driven recommendations and explaining budget constraints. She keeps the conversation grounded in strategic priorities, ensuring Council's decisions align with long-term municipal goals.

By **11:00 a.m.**, she's meeting with local business leaders and economic development agencies to discuss an investment opportunity. She articulates how the municipality can support growth while maintaining fiscal responsibility. The session ends with a commitment to explore public-private partnership options.

At **12:00 p.m**., she visits the Public Works yard to check in with the field staff, thanking the crews for their work and hearing their insights on operational challenges.

At **12:30 p.m.**, she takes a working lunch, preparing for the afternoon's public engagement session on a major infrastructure project. Transparency and community trust are key, so she ensures her presentation addresses residents' concerns and emphasizes the municipality's long-term vision.

By **2:00 p.m.**, Sarah is briefing the communications team. A major funding announcement from the Province is expected, and she needs a clear, coordinated message. She also reviews crisis management protocols, ensuring readiness for potential public scrutiny.

At **3:30 p.m.**, she joins a regional intergovernmental meeting, advocating for municipal priorities on housing and transportation. She secures a commitment from provincial officials for additional funding discussions, a small but meaningful win.

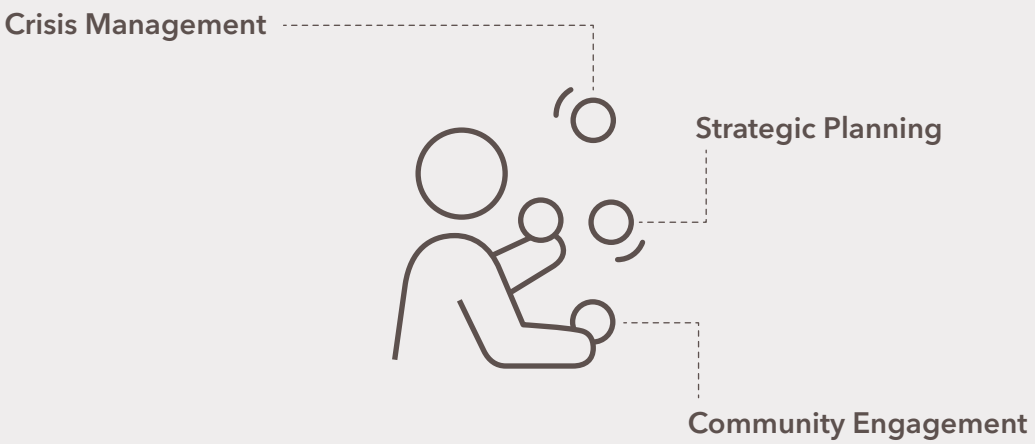
At **4:45 p.m.**, she stops by the Recreation Centre to connect with front-line staff, observing after-school programs and reinforcing her support for community services.

At **5:00 p.m.**, Sarah debriefs her executive team, reflecting on the day's challenges and opportunities. Emails from residents and Council continue to pour in, but she sets boundaries—some will be addressed tomorrow.

At **6:30 p.m.**, she attends a Council meeting, presenting updates on strategic initiatives and responding to questions with measured confidence. Navigating political dynamics, ensuring fiscal accountability, and maintaining ethical leadership are all in a day's work.

As the meeting wraps up at **9:00 p.m.**, Sarah heads home, knowing that tomorrow will bring a new set of challenges and opportunities. But for now, she takes a deep breath, proud of the work done to strengthen the community.

This glimpse into a CAO's day highlights the multi-faceted nature of the role—governance, crisis management, strategic planning, and community engagement all demand attention. More than a municipal administrator, a CAO is a leader, strategist, and innovator, shaping the future of the community they serve.



POSITIONING YOURSELF FOR SUCCESS: NAVIGATING THE CAO JOB MARKET & INTERVIEW PROCESS

Understanding the CAO Job Market

To secure the right opportunity, aspiring CAOs must understand the job market. CAO positions are typically advertised through professional organizations like CAMA and Provincial/Territorial municipal associations. Councils seek experienced leaders with strong governance expertise, leadership skills, and the ability to navigate political and operational complexities.

The hiring process often involves search firms, hiring committees, or direct recruitment, with a focus on candidates who can build productive Council relationships, drive strategic initiatives, and ensure municipal stability. Success in securing a CAO role requires a solid grasp of municipal governance, financial stewardship, and confident leadership.

Understanding the Role of Executive Search Firms in CAO Recruitment

Executive search firms play a key role in CAO recruitment, acting as intermediaries between candidates and hiring municipalities. Knowing how these firms operate and how to engage with them effectively can enhance your career prospects.

The Role of Search Firms

- **Identifying Candidates:** Search firms assess candidates based on municipal needs, governance, expectations, and leadership fit.
- **Offering Strategic Insights:** They provide feedback on municipal priorities, workplace culture, and expectations to help candidates make informed decisions.
- **Ensuring Discretion:** Reputable firms handle applications confidentially, protecting employed candidates from unnecessary exposure.

How to Work with Search Firms

- **Build Your Professional Profile:** Keep your résumé, cover letter, and LinkedIn profile updated to highlight governance expertise, leadership experience, and accomplishments.
- **Engage Proactively with Search Firms:** Establish relationships with recruiters specializing in municipal hiring and CAO placements.
- **Communicate Your Priorities Clearly:** Be upfront about your career goals, leadership approach, and non-negotiables, such as governance expectations, relocation, and salary requirements.
- **Prepare for Various Evaluations:** Expect structured interviews, psychometric tests, and reference checks, which vary by firm and recruitment process.

Pros and Cons of Working with Executive Search Firms

Below is a table outlining some of the key advantages and potential challenges of working with these firms as you navigate the CAO recruitment process.

Pros	Cons
Access to Exclusive Opportunities – Some CAO roles are only advertised through search firms.	**Limited Transparency** – Not all firms provide detailed information into Council dynamics and organizational culture.
Professional Representation – Recruiters advocate for you and present your qualifications effectively.	**Potential Bias Toward Internal Candidates** – Some firms conduct external searches as a formality while favouring internal applicants.
Salary & Contract Negotiation Support – Firms can assist in securing fair and competitive compensation.	**Firms Prioritize the Municipality** – Their primary obligation is to the hiring municipality, not the candidate.
Confidentiality – Firms discreetly present your candidacy, protecting employed candidates.	**Varying Levels of Expertise** – Some firms specialize in municipal hiring, while others take a broader approach to executive recruitment.

Final Considerations

- **Assess the Firm's Municipal Expertise** – Not all executive search firms understand municipal governance. Research firms with a strong track record in CAO recruitment.
- **Conduct Your Own Due Diligence** – Review Council meeting minutes, financial reports, and organizational culture beyond what the search firm provides.
- **Be Selective About Opportunities** – Not every recruitment is the right fit. Ensure alignment with your leadership style and career trajectory before engaging.
- **Prepare for a Rigorous Process** – CAO recruitment involves multiple interview rounds, Council presentations, and in-depth background checks—stay engaged and well-prepared.

CAO Pro Tip: Your Reputation Matters

In the municipal world, your reputation speaks louder than your résumé. Executive search firms rely on industry networks, references, and word-of-mouth insights when evaluating candidates.

How you engage with elected officials, peers, and staff today can shape future career opportunities—even before a position is posted. Maintaining professionalism, demonstrating integrity, and fostering strong governance relationships will position you as a top candidate for executive roles.

Sample Interview Questions for CAO Candidates

Candidates for the CAO role should be prepared to answer a mix of governance, leadership, financial, and crisis management questions. Below are sample interview questions a municipal Council or hiring committee may ask to assess readiness, leadership style, and ability to navigate political and operational challenges.

1. **Governance & Council Relations**
2. **Leadership & Decision-Making**
3. **Financial & Operational Management**
4. **Crisis & Risk Management**
5. **Community Engagement & Public Relations**
6. **Ethics & Professional Conduct**
7. **Vision & Strategic Growth**

1 Governance & Council Relations

- How would you handle a divided Council with conflicting priorities?
- What strategies do you use to build a productive CAO-Council relationship?
- How do you ensure political neutrality while providing strategic advice to Council?
- How do you balance implementing Council's vision while ensuring operational feasibility?
- What approach would you take to support newly elected Council members during their transition?

2 Leadership & Decision-Making

- Can you describe a time you had to make a difficult decision with incomplete information?
- What leadership style do you use when managing senior staff and fostering team collaboration?
- How do you handle disagreements with Council while maintaining professionalism and objectivity?
- Describe a situation where you had to manage a high-stakes municipal issue—how did you approach it?
- What strategies do you use to foster an effective, high-performing municipal workforce?
- How do you support the growth and development of staff?
- How do you foster a positive working environment?

3 Financial & Operational Management

- What steps do you take to ensure long-term financial sustainability for a municipality?
- How do you prioritize budget decisions when financial constraints require tough trade-offs?
- Describe your experience managing capital projects and infrastructure investments.
- How do you approach long-term strategic planning for a municipality?
- What key financial indicators do you monitor to assess municipal health?

4 Crisis & Risk Management

- Have you ever managed a municipal crisis? Walk us through your response.
- How would you handle public backlash over a controversial municipal decision?
- How do you prepare for and mitigate risks related to public safety, governance, and service delivery?
- What steps would you take to manage a reputational crisis affecting the municipality?
- How do you communicate with Council, staff, and the public during an emergency?

5 Community Engagement & Public Relations

- How do you build trust between the municipality and the public?
- Describe a successful community engagement initiative you led.
- What communication strategies do you use to explain complex municipal issues to the public?
- How do you handle misinformation or public criticism of municipal operations?
- What role does social media play in modern municipal leadership, and how do you manage it?

6 Ethics & Professional Conduct

- How do you handle ethical dilemmas in municipal leadership?
- Describe a time when you had to stand by a difficult but necessary decision despite opposition.
- How do you ensure municipal operations remain transparent and accountable?
- What would you do if a Council member attempted to interfere in municipal operations?
- How do you foster a culture of ethical governance within municipal administration?

7 Vision & Strategic Growth

- What is your approach to fostering economic development in a municipality?
- How do you balance growth and sustainability while planning for the future?
- What innovative initiatives have you implemented to improve municipal operations?
- How do you ensure municipal services remain modern, efficient, and accessible?
- What trends do you believe will shape the future of municipal governance, and how should municipalities prepare?

Do your homework. Research the municipality thoroughly—understand its governance structure, key priorities, recent challenges, and emerging opportunities. Council will want to know why you are interested in their municipality specifically, and they will be looking for evidence that you've taken the time to get to know them. Demonstrating awareness of their local context helps build credibility and shows that you're invested in contributing to their success.

Be prepared for scenario-based questions that assess how you think under pressure and respond to complex issues. These might include managing a divided Council, addressing budget shortfalls, or responding to infrastructure failures. Having real-world examples ready will help you confidently demonstrate your leadership approach, problem-solving skills, and strategic vision.

THE IMPORTANCE OF A CAO EMPLOYMENT CONTRACT

A well-structured CAO employment contract is essential before stepping into the role. The CAO contract establishes the terms of employment, defines expectations, and protects both the municipality and the CAO. It should outline critical elements such as salary, benefits, performance evaluation processes, termination clauses, and dispute resolution mechanisms.

CAO Pro Tip: Don't Skip Your Own Performance Evaluation

Make sure your employment contract includes a clear, annual performance evaluation process. Use it not just as a report card, but as a leadership alignment tool with Council. A good evaluation clarifies expectations, strengthens communication, and helps you grow as a leader.

A well-structured contract provides clarity on roles and responsibilities, ensuring a smooth working relationship with Council. Entering negotiations with a strong understanding of these key provisions helps set the foundation for long-term success. For detailed guidance on structuring and negotiating your CAO employment contract, refer to **CAMA's CAO Employment Contract Toolkit**.

CAO Pro Tip: Depoliticize Performance and Compensation

A structured, Council-endorsed policy—ideally facilitated by a third party—helps ensure performance evaluations and compensation reviews are fair, evidence-based, and free of political bias.

ALIGNING YOUR SKILLS AND VALUES WITH THE RIGHT MUNICIPALITY

Choosing the right municipality is a defining career decision for any CAO. The right fit enhances your leadership impact, professional fulfillment, and ability to drive meaningful change.

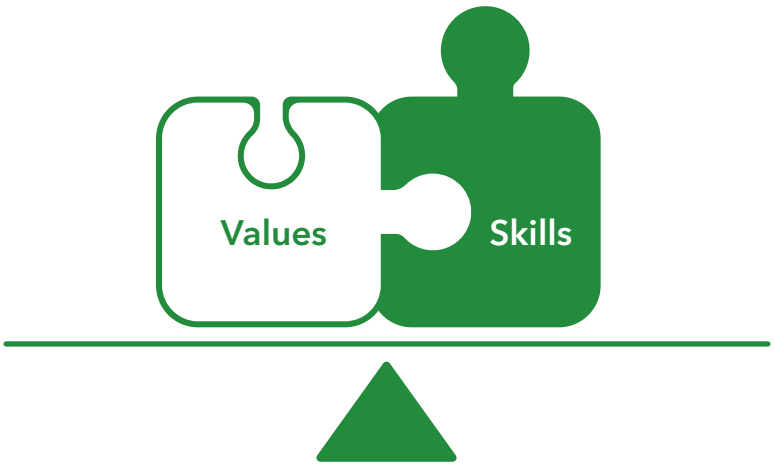
Why Alignment Matters

A CAO is more than a leader—they shape municipal culture, drive strategy, and serve as a bridge between Council, staff, and the community. A poor fit can lead to frustration and strained relationships, while the right fit allows you to:

- **Leverage Your Strengths** – Apply your expertise where it has the most impact.
- **Align with Your Values** – Work in an environment that matches your leadership vision and governance philosophy.
- **Foster Long-Term Success** – Build trust with Council, staff, and the community by addressing their specific needs effectively.

Finding the Right Fit

Finding the right municipality requires a thoughtful, strategic approach. Beyond aligning your skills to the role, consider governance structures, community priorities, and workplace culture to ensure you can lead effectively and build lasting relationships.



The following steps will guide you in making an informed and confident decision.

Step	Key Questions to Consider
Assess Your Skills and Strengths	• What are your core competencies—financial management, strategic planning, community engagement? • What is your leadership style—hands-on, strategic, or collaborative? • What past successes demonstrate your ability to lead effectively?
Define Your Values and Priorities	• What governance philosophies align with your leadership approach? • Do you prefer working in a growth-focused municipality or one in financial recovery? • What workplace culture and community expectations best fit your leadership style?
Research Potential Municipalities	• Understand how Council interacts with the CAO and whether the governance model supports effective leadership. • Review strategic plans, budgets, and public feedback to determine the priorities of the community. • Assess the organizational culture with respect to staff turnover, workplace dynamics, and Council-administration relations. • Consider how your experience aligns with the scale of the municipality's challenges.
Evaluate the Municipality's Challenges	• Is the community focused on growth, stability, or managing decline? • What are its key challenges—climate adaptation, infrastructure, housing, or economic development? • How engaged is the community, and what expectations are placed on the CAO?
Determine Your Fit	• Does the municipality need your expertise? • Do its priorities and culture align with your leadership style? • Does this feel like a place where you can truly make a difference?

Making the Right Choice

Choosing the right municipality isn't just about finding a job—it's about selecting a community where you can thrive and lead with impact. This process requires self-reflection, research, and a commitment to prioritizing fit over convenience. Success in the CAO role isn't about perfection—it's about preparation. By evaluating your strengths, investing in professional development, and making an informed decision, you can build a fulfilling and impactful career.

CAO Pro Tip: Let Your Experience Guide You–Quietly

Be cautious about saying "Back when I was in…" too often. While experience is valuable, referencing your past municipality too much can signal a lack of connection to the local context. Let your previous experience shape your decisions—but focus your conversations and strategies on this community, not the last one. Leadership credibility comes from relevance, not résumé.

Case Study: The Consequences of a Poor Fit - A CAO's Leadership Challenge

Alex, a successful Deputy CAO with over a decade of experience in a mid-sized municipality, was eager to step into the top administrative role. When offered a CAO position in a smaller municipality with financial and governance challenges, he saw it as an exciting opportunity to make a difference.

The Warning Signs

During the interview process, several red flags emerged:

- **High Council Turnover & Division** – Frequent resignations, two Mayors in five years, and vague responses about governance stability.
- **Lack of Strategic Direction** – No recent strategic plan, with Council members offering conflicting priorities.
- **Staff Turnover & Toxic Culture** – Key positions were vacant, and a department head warned of unrealistic expectations.
- **Unrealistic Expectations** – The Mayor expected Alex to "fix everything quickly" with little emphasis on collaboration.
- **Troubled Financial Landscape** – The municipality had been draining reserves to balance budgets with no long-term financial strategy.

The Reality

Within six months, the challenges became overwhelming:

- **Conflicting Council Priorities** – Contentious meetings with no shared vision.
- **Micromanagement & Interference** – Council bypassed the CAO, giving direct instructions to staff, undermining the CAO's authority.
- **Declining Staff Morale** – High turnover left Alex constantly hiring rather than focusing on strategic improvements.
- **Public Scrutiny & Resistance to Change** – Skepticism from the community made implementing change difficult.

The Outcome & Lessons Learned

After 18 months, Alex resigned, realizing that the misalignment between his leadership style and the municipality's culture made long-term success unsustainable. His key takeaways:

- Research governance stability and Council dynamics before accepting a role
- Ask direct questions about workplace culture, strategic direction, and staff retention.
- Ensure expectations are realistic—a CAO cannot single-handedly "fix" a municipality.
- Trust your instincts—if something feels off, it probably is.

Alex now shares his experience with aspiring CAOs, emphasizing that the right fit is crucial for both professional success and personal fulfillment.

Case Study: Turning Around a Struggling Municipality

When Judy was hired as CAO, she inherited a municipality facing financial instability, public distrust, and low staff morale. Years of mismanagement had led to budget deficits and a disengaged community. Her first steps included conducting a financial audit, increasing transparency through public updates, and restructuring the budget to focus on long-term sustainability. By fostering stronger Council relations, implementing accountability measures, and engaging residents in decision-making, she slowly rebuilt public confidence. Within two years, the municipality had balanced its budget, restored key services, and regained community trust, proving that clear strategy and decisive leadership can drive lasting change.

Turning Around a Struggling Municipality

CORE RESPONSIBILITIES AND EXPECTATIONS OF A CAO

Note: The proportion of time and focus dedicated to each area may vary depending on the municipality's size, structure, strategic priorities, and local context. This pie chart is intended to reflect the core responsibilities of a CAO, not their relative weight in all organizations.

Effective leadership as a Chief Administrative Officer (CAO) begins with a deep understanding of municipal operations, governance, and community needs. A clear grasp of municipal operations, governance structures, and community priorities enables informed decision-making, effective leadership, and trust-building with Council, staff, and residents.

As the administrative head of the municipality, a CAO is responsible for driving good governance, financial sustainability, and public service excellence. Central to this role is the ability to uphold confidentiality—particularly in Council discussions, closed sessions, and public interactions. The CAO must navigate complex and often sensitive matters with discretion, ensuring that trust and professional integrity are maintained at all times.

The following sections outline the key responsibilities that define the role.

Key Responsibility Area	Role of the CAO/Key Responsibilities
Governance, Leadership & Council Relations 	As a CAO, you are the principal advisor to Council, guiding decision-making through evidence-based recommendations. You must balance strategic foresight, operational expertise, and leadership of a multidisciplinary team while maintaining strong relationships with elected officials. **Key Responsibilities:** • **Facilitating Effective Governance Practices:** Support Council by providing expert advice, fostering productive discussions, and ensuring adherence to municipal policies. • **Navigating Political Dynamics:** Maintain neutrality, manage differing leadership styles, and address Council overreach into operations diplomatically. • **Building Trust & Accountability:** Foster transparency and mutual respect among Council, staff, and the community. • **Governance Best Practices & Legislative Compliance:** Stay current with municipal, provincial, and federal regulations to ensure legal adherence. • **The Value of Strong Policy Frameworks:** Clear, well-structured policies are essential for consistent decision-making, risk management, and good governance. As CAO, ensure your municipality's policy framework is up to date, well-communicated, and aligned with strategic goals. Strong policies protect the organization—and its leaders—by reducing ambiguity and reinforcing accountability. • **Digital Oversight & Cybersecurity Risk:** Technology oversight is no longer just the responsibility of the IT department—if one even exists. CAOs must understand the governance and risk implications of cybersecurity, digital services, and data management. Whether it's responding to a ransomware attack, evaluating cloud-based solutions, or managing digital records, today's CAO is increasingly drawn into the technology realm and should be prepared to lead or guide strategic decisions in this space.

Key Responsibility Area	Role of the CAO/Key Responsibilities
Policy & Strategic Implementation 	A CAO plays a critical role in translating Council's vision into concrete actions while ensuring alignment with municipal priorities and community needs. This requires strategic planning, policy execution, and continuous performance monitoring to ensure effective implementation. **Key Responsibilities:** • **Developing & Monitoring Strategic Plans:** Engage Council, staff, and stakeholders to set long-term goals with measurable objectives. • **Translating Policy into Action:** Work with department heads to implement Council directives through well-structured municipal programs and services. • **Aligning Operations with Strategic Priorities:** Ensure day-to-day administration supports Council's vision while balancing fiscal, operational, and regulatory constraints. • **Performance Measurement & Reporting:** Establish tools and metrics to track progress, assess policy impact, and provide transparent updates to Council and the community.
Financial Oversight & Budgeting 	A CAO ensures financial sustainability, accountability, and responsible fiscal management and municipal budgets reflect community priorities. **Key Responsibilities:** • **Overseeing Budget Development:** Align operating and capital budgets with strategic goals while ensuring fiscal responsibility. • **Managing Financial Risks:** Implement sound financial policies to balance revenues and expenditures, avoid deficits, and build reserves. • **Providing Transparent Reporting:** Prepare clear financial reports for Council and the public to foster trust.

Key Responsibility Area	Role of the CAO/Key Responsibilities
	Budget Messaging and Public Confidence How a CAO frames the budget can influence how it's received. Instead of saying "We're cutting services," say "We're investing strategically to ensure long-term sustainability." When facing public or Council scrutiny: • Stick to data and approved priorities. • Acknowledge concerns without becoming defensive. • Use language that emphasizes stewardship, transparency, and alignment with community goals. **CAO Pro Tip:** When in doubt, buy time. If you're caught off-guard by a question, it's okay to say "Let me get back to you with accurate information." This builds trust and protects your credibility. • **Funding Models:** Grants, taxes and user fees. • **Procurement, Reserves, and Revenue Strategies:** Ensure procurement processes are transparent, cost-effective, and adhere to legislative and ethical standards to maximize value for public funds.
Long-Term Financial Sustainability 	A CAO plays a vital role in ensuring the financial health of the municipality over time, balancing immediate needs with future obligations. This requires strategic oversight of revenues, expenditures, and reserve planning while maintaining public trust through fiscal transparency. **Key Responsibilities:** • **Establishing Financial Sustainability Frameworks:** Develop multi-year financial plans that align with Council's strategic priorities and support service delivery. • **Managing Reserves and Debt:** Build and manage reserves to fund long-term obligations and mitigate risks; ensure debt levels are responsible and sustainable. • **Ensuring Revenue Stability:** Monitor and adjust tax rates, user fees, and alternate funding sources to support reliable municipal funding. • **Promoting Fiscal Accountability:** Embed financial literacy in senior leadership; foster a culture of cost-conscious decision-making.

Key Responsibility Area	Role of the CAO/Key Responsibilities
Asset Management 	Asset management is about making informed decisions on building, maintaining, and replacing municipal infrastructure to ensure sustainable service delivery. A CAO must lead the integration of asset data into budgeting and planning processes, ensuring long-term value and risk mitigation. **Key Responsibilities:** • **Implementing Asset Management Plans:** Ensure all municipal assets (e.g., roads, facilities, water systems) are inventoried, monitored, and evaluated based on lifecycle cost. • **Linking Assets to Service Levels:** Align infrastructure decisions with Council-approved service standards and community expectations. • **Integrating with Budgeting and Capital Planning:** Embed asset management data into annual budgeting and long-term capital forecasts. • **Legislative Compliance and Risk Mitigation:** Ensure compliance with provincial asset management regulations and proactively address asset risks and vulnerabilities.
Human Resources & Organizational Leadership 	A CAO leads the senior management team and shapes workplace culture, ensuring the municipality operates effectively and fosters a motivated, high-performing workforce. Strong leadership in human resources is essential for attracting top talent, maintaining staff engagement, and developing future municipal leaders. **Key Responsibilities:** • **Recruitment & Succession Planning:** Ensure the municipality attracts and retains top talent by implementing strategic hiring practices and long-term workforce planning. • **Performance Management:** Support department heads in setting clear expectations, evaluating progress, and fostering professional growth through regular feedback and performance reviews. **CAO Pro Tip:** Deputies and senior staff are not just reports—they're your allies. Build mutual trust and empower them as strategic partners. A strong leadership team can extend your influence, reinforce your messaging, and help you navigate difficult Council dynamics or high-pressure moments with unity and professionalism.

Key Responsibility Area	Role of the CAO/Key Responsibilities

- **Workplace Culture & Staff Engagement:** Promote a positive, inclusive, and accountable work environment that encourages collaboration and employee well-being.

CAO Pro Tip: You Set the Tone for Staff Culture

Staff are watching. Your words, tone, body language, and how you handle tension set the cultural tone more than any policy ever could. Model respect, clarity, and calm—especially during conflict—and your organization will mirror it.

- **Organizational Structure & Leadership Development:** Assess and refine municipal organizational structures to improve efficiency, service delivery, and team effectiveness. Establishing a formal structure for Senior Leadership Team (SLT) meetings is equally important. Regular, well-organized SLT meetings foster collaboration across departments, break down silos, and help create a unified, inclusive workplace. This consistent forum for strategic discussion ensures that policies and processes are aligned and applied uniformly across the organization.
- **Labour Relations & Conflict Resolution:** Navigate unionized and non-unionized work environments, ensuring fair collective bargaining, grievance management, and dispute resolution processes.
- **Human Resources Policy Compliance & Best Practices:** Ensure adherence to employment laws, workplace policies, and ethical standards to minimize risks and maintain organizational integrity.

Key Responsibility Area	Role of the CAO/Key Responsibilities

CAO Pro Tip: Navigating the Complexities of Human Resources

One of the most challenging aspects of being a CAO is managing human resources. From recruitment and retention to performance management and labour relations, HR decisions can be some of the most complex and high-stakes responsibilities you will face. You will need to navigate employment laws, collective agreements, workplace policies, and organizational culture while balancing the expectations of Council and staff. Effective HR leadership ensures a strong, motivated workforce and minimizes risks associated with workplace disputes, grievances, and turnover. For a deeper dive into HR management, refer to **CAMA's Human Resources Toolkit**, which provides comprehensive guidance on employment best practices, performance management, conflict resolution, and succession planning.

CAO Pro Tip: The Critical Role of Succession Planning

Strong municipalities are built on strong leadership teams, and as a CAO, part of your responsibility is ensuring organizational continuity. Succession planning is more than preparing for your own replacement—it's about identifying and developing future leaders within your municipality at every level.

CAO Transitions as Renewal Moments: Long-serving CAOs bring stability and deep organizational memory—but their departure can also be a springboard for change. Succession planning is a chance to modernize operations, refresh leadership development approaches, and re-engage staff in a new vision. Ensure your exit strategy highlights opportunities for innovation while respecting legacy systems.

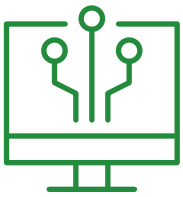
A well-structured succession plan mitigates risks associated with retirements, departures, and sudden vacancies, ensuring that key positions are filled with capable, prepared individuals. Investing in leadership development fosters stability, enhances service delivery, and strengthens organizational culture. For detailed strategies and tools to implement a succession plan, refer to **CAMA's Succession Planning Toolkit**.

Key Responsibility Area	Role of the CAO/Key Responsibilities
	Don't Underestimate Acting Roles While often viewed as part of long-term succession development, acting roles are also a vital operational lifeline—especially when your leadership bench is thin and your vacation is long overdue. Designating capable staff for temporary acting assignments ensures continuity, builds confidence across the team, and provides real-time leadership experience. It also sends a powerful message that leadership is a shared responsibility, not a bottleneck.
Public Engagement & Communications 	Effective communication is crucial for building trust, fostering transparency, and securing community support. A CAO must ensure that municipal messaging is clear, accessible, and aligned with community expectations. **Key Responsibilities:** • **Developing Public Engagement Strategies:** Create inclusive processes for gathering community input and encouraging civic participation. • **Serving as a Municipal Spokesperson:** Ensure accurate and timely communication during critical events. **CAO Pro Tip: Embrace the "Coffee Shop Test"** Before making a decision or recommending action, ask yourself: "How would this sound at the local coffee shop?" Residents want fairness, transparency, and plain-language explanations. Thinking this way helps keep public trust front and centre. • **Leveraging Social Media & Digital Platforms:** Utilize social media, websites, and digital tools to engage residents, provide real-time updates, and manage public perception. • **Building Partnerships:** Foster relationships with local businesses, organizations, and residents.

Key Responsibility Area	Role of the CAO/Key Responsibilities
Crisis Management & Risk Mitigation 	A CAO must be prepared to handle emergencies and unexpected challenges. **Key Responsibilities:** • **Developing Crisis Response Plans:** Ensure the municipality is ready to address natural disasters, political crises, and reputational risks. • **Managing Public & Council Expectations:** Communicate effectively during high-pressure situations to maintain confidence. • **Ensuring Business Continuity:** Implement risk management strategies to sustain municipal operations.
Intergovernmental Relations & Advocacy 	Many municipal initiatives require collaboration with other levels of government. **Key Responsibilities:** • **Advocating for Municipal Interests:** Engage with provincial and federal governments to secure funding and policy support. • **Navigating Jurisdictional Issues:** Work within legislative frameworks to advance municipal priorities. • **Representing the Municipality:** Participate in regional partnerships and policy discussions to strengthen municipal influence.
Ethical Leadership & Integrity 	A CAO sets the ethical tone for the organization, ensuring transparency, accountability, and professional conduct in all municipal operations. **Key Responsibilities:** • **Upholding Professional and Ethical Standards:** Establish and reinforce a culture of integrity by adhering to codes of conduct, governance best practices, and ethical decision-making frameworks. • **Managing Conflicts of Interest:** Identify, disclose, and mitigate conflicts of interest to uphold public trust and prevent ethical breaches. • **Ensuring Transparency in Governance:** Promote open government practices by fostering clear communication with Council, staff, and the public. • **Fostering a Culture of Accountability:** Hold senior leadership accountable for ethical decision-making and ensure staff adherence to municipal policies and values.

Key Responsibility Area	Role of the CAO/Key Responsibilities
Service Delivery & Operational Efficiency 	Delivering high-quality, efficient municipal services is central to a CAO's role. **Key Responsibilities:** • **Ensuring Efficient Service Delivery:** Oversee municipal operations to optimize service effectiveness and responsiveness to community needs. • **Implementing Performance Measurement Systems:** Establish key performance indicators (KPIs) to evaluate service delivery and drive continuous improvement. • **Utilizing Technology & Innovation:** Leverage digital tools and smart technology to modernize municipal services and enhance efficiency. • **Streamlining Processes & Reducing Bureaucracy:** Identify opportunities to simplify workflows and improve municipal service accessibility for residents and businesses. • **Supporting Staff Development:** Champion professional development opportunities that build internal capacity, foster innovation, and empower staff to deliver excellent service. **CAO Pro Tip: Getting Out of the Office: Building Strong Connections Across Departments** One of the most impactful things a CAO can do is get out of the office and engage directly with staff in all departments. A successful CAO is not just a figurehead at City Hall but a visible and approachable leader who understands the operations on the ground. Regular check-ins with employees across different service areas foster a culture of openness, trust, and collaboration. These visits allow you to hear directly from frontline staff about challenges, successes, and areas for improvement, strengthening both morale and operational effectiveness. By actively engaging with employees, you reinforce that every role within the organization contributes to the municipality's success. A leader who is seen, heard, and engaged inspires a workforce that is motivated and committed to excellence.

Key Responsibility Area	Role of the CAO/Key Responsibilities
Economic Development & Growth 	A CAO plays a critical role in advancing economic development, guiding infrastructure planning, and supporting sustainable, long-term community growth. This includes creating the conditions for investment, aligning development with strategic goals, and ensuring economic opportunity is balanced with environmental and fiscal responsibility. **Key Responsibilities:** • **Collaborating with Economic Development Partners:** Work with business leaders, local organizations, Indigenous governments, and economic development agencies to attract investment, support entrepreneurship, and promote job creation. • **Integrating Economic Goals with Land Use and Infrastructure Planning:** Align growth objectives with zoning, servicing, transportation, and infrastructure readiness to ensure the municipality is positioned for strategic development. • **Promoting a Business-Friendly Climate:** Champion service improvements and streamlined processes that reduce barriers and support a thriving local business environment. • **Leveraging Funding and Partnerships:** Seek out provincial, federal, and private-sector funding opportunities to support key infrastructure and economic initiatives. • **Supporting Workforce and Community Readiness:** Collaborate with education, training, and workforce development partners to ensure local skills align with industry needs. • **Balancing Growth with Sustainability:** Ensure economic initiatives reflect community values and support housing, climate action, and long-term resilience.

Key Responsibility Area	Role of the CAO/Key Responsibilities
Change Management & Innovation 	Municipalities must continuously evolve to meet emerging challenges, and a CAO leads the charge in fostering innovation and adaptability. **Key Responsibilities:** • **Leading Organizational Change:** Guide staff and Council through transitions, whether technological, structural, or policy-driven, ensuring smooth adaptation. • **Encouraging a Culture of Innovation:** Promote creative problem-solving and continuous improvement to enhance municipal services. • **Managing Digital Transformation:** Oversee the implementation of modern technologies, such as cloud-based systems and data-driven decision-making tools, to improve efficiency. • **Modernizing Municipal Systems:** Lead the adoption of best practices in municipal governance, service delivery, and public engagement.

A successful CAO must be a strategic leader, financial steward, and relationship builder who can navigate governance, operational, and community dynamics while maintaining professionalism and accountability.

CAO Pro Tip: Integrity Builds Trust

Owning your mistakes doesn't weaken your credibility—it strengthens it. Demonstrating accountability fosters respect, reinforces ethical leadership, and sets the tone for a transparent, trust-based relationship with Council.

Understanding the Interim CAO Role

Serving as an Interim CAO presents distinct leadership challenges, whether you are stepping up from within the organization or arriving as an experienced external leader. Regardless of the circumstances, the role demands stability, continuity, and a smooth transition to permanent leadership. The following sections explore the unique considerations for each pathway, along with strategies for success.

Scenario 1: Internal Director Stepping Up as Interim CAO

For internal senior staff, stepping into the Interim CAO role is both a career-defining opportunity and a challenging transition, particularly when leading former peers. This requires balancing continuity with change while proving leadership capabilities to Council, staff, and the organization.

Challenges and Considerations

- **Transitioning from Peer to Leader** – Leading former colleagues can be complex. You will need to set clear expectations, redefine relationships, and establish authority while maintaining trust.
- **Earning Council's Confidence** – Some Council members may see you as a temporary solution rather than a strategic leader. Demonstrating strong decision-making and governance skills will be key.
- **Managing Internal Expectations** – While some staff may support your appointment, others—especially those who aspired to the role—may be skeptical. Transparency and fairness in leadership will be essential.
- **Balancing Leadership with Neutrality** – If you are a candidate for the permanent role, maintain professionalism by separating your internal responsibilities from the recruitment process.

Key Strategies for Success

- **Establish Clear Leadership from Day One** – Hold an initial meeting with Council and staff to set expectations, clarify your authority, and reinforce continuity. Communicate openly about your role, decision-making scope, and approach to ongoing projects. Avoid major operational changes unless necessary.
- **Demonstrate Strategic Thinking** – Council needs to see you as more than a caretaker. Present well-researched recommendations, provide solutions, and proactively manage challenges.
- **Maintain Stability & Morale** – Staff may feel uncertain about leadership changes. Reinforce that the organization remains strong and that their work is valued.
- **Remain Professional About the CAO Recruitment Process** – If you are a candidate, ensure fairness and transparency in all decisions. Avoid any perception that you are using the interim role to secure the permanent position.

Scenario 2: Experienced External CAO Brought In as Interim

When a municipality brings in an external Interim CAO, the priority is often to stabilize leadership while conducting a search for a permanent CAO. This requires quickly integrating into an unfamiliar organization and earning trust from Council, staff, and the community.

Challenges and Considerations

- **Building Trust with Council and Staff** – As an outsider, you must quickly establish credibility. Staff may be wary of change, while Council may have differing expectations for your role. Transparency and relationship-building are key.
- **Clarifying Your Mandate** – Unlike a permanent CAO, your role is likely focused on stabilization rather than long-term strategy. Understanding Council's priorities early will prevent misalignment.
- **Balancing Continuity with Impact** – While maintaining stability is the priority, you may also identify critical areas for short-term improvement. Striking the right balance ensures a smooth transition for the next CAO.

Key Strategies for Success

- **Clarify Expectations with Council** – Define whether your role is strictly maintaining operations or if you are expected to address pressing issues. Misaligned expectations can lead to tension.
- **Be Visible and Accessible** – Engage with staff, Council, and stakeholders. Walk the floors, attend meetings, and understand the organization's culture. This builds trust and credibility.
- **Respect the Organization's History** – Every municipality has a unique context. While your experience is valuable, take time to listen and learn before making major changes.
- **Act as a Bridge, Not a Bulldozer** – Your role is to support a seamless transition for the permanent CAO, not to overhaul the organization. Maintain stability while ensuring the next leader inherits a well-functioning administration.
- **Prepare a Thoughtful Exit Plan** – Before leaving, document key initiatives, outstanding challenges, and recommendations for the incoming CAO to ensure continuity.

Regardless of how you step into the Interim CAO role, success hinges on stability, communication, and adaptability. Your leadership must uphold strong governance, maintain trust with Council and staff, and guide the organization through a smooth transition.

Those who approach the role with clarity, professionalism, and a strategic mindset will not only benefit the organization but also enhance their own leadership reputation. Whether as an internal or external leader, an Interim CAO's influence can set the stage for long-term municipal success.

Case Study: The Employee Experience During an Interim CAO Transition

When a municipality's long-serving CAO retired, Ann, the Director of Finance, was appointed as Interim CAO. While she had worked closely with the previous CAO, her promotion created uncertainty among staff.

For many, Ann's appointment raised questions. John, a department head, wondered if she would advocate for long-term improvements or just maintain operations. Emily, a frontline employee, was unsure of her authority or whether Council would override her decisions. Others, including former peers, felt uneasy now reporting to her, and some questioned why she was chosen over other directors.

Without clarity, staff worried: Would priorities shift? Was Ann making real decisions, or was she just a placeholder?

Ann quickly addressed concerns by holding an all-staff meeting to acknowledge the transition and reinforce continuity, openly communicating her decision-making authority and commitment to stability, and scheduling open-door sessions to listen to concerns and promote a collaborative leadership style.

These actions reassured employees that despite the leadership change, their work was valued, and municipal priorities remained intact.

What Employees Need from an Interim CAO

- **Reassurance** – Regular communication prevents uncertainty and keeps morale high.
- **Trust Building** – Employees need to see the Interim CAO as a capable leader, not just a placeholder.
- **Clear Expectations** – Without direction, staff may hesitate to move projects forward, waiting for the permanent CAO.

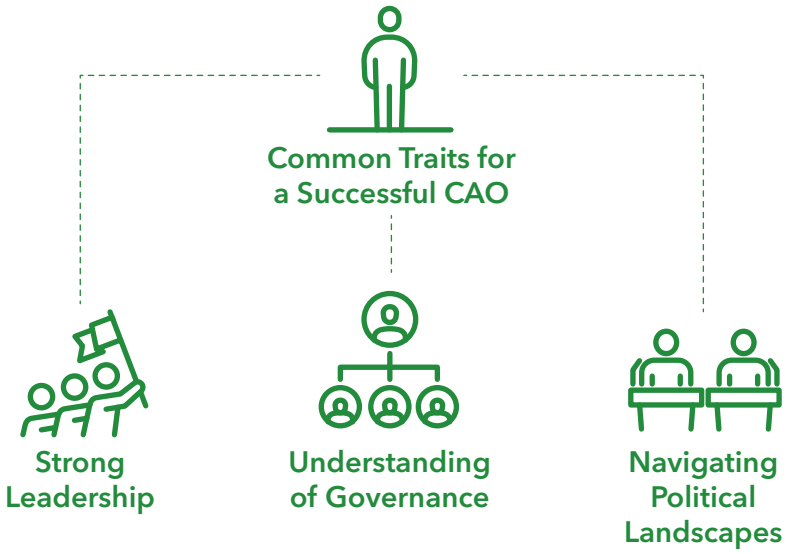
While Ann did not pursue the permanent role, her steady leadership ensured a seamless transition for her successor.

CAO Pro Tip: Employees may not choose their leaders, but how those leaders navigate change determines whether an organization remains stable or struggles through uncertainty.

CAREER PATHWAYS TO THE CAO ROLE

There is no single path to becoming a Chief Administrative Officer (CAO). Municipal leaders come from diverse backgrounds, including government, private industry, nonprofits, and the military. While their journeys vary, successful CAOs share common traits—strong leadership, a deep understanding of governance, and the ability to navigate political landscapes.

This section explores common career pathways, key skills, and strategies to transition successfully.



No Single "School" for Becoming a CAO

Becoming a CAO requires adaptability, strategic thinking, and a willingness to navigate new challenges. Each municipality has unique political dynamics, governance structures, and community expectations, meaning no two CAO roles are exactly alike. While preparation is essential, much of the learning happens on the job.

Common Pathways to the CAO Role

The following pathways outline common routes to the CAO role, along with key strategies for a smooth transition:

Career Pathway	Key Strategies for a Successful Transition
Advancing Within Local Government Progressing from Manager, Department Head, Assistant CAO, or Deputy CAO.	• Expand expertise beyond your department (e.g., finance, strategic planning). • Build relationships with Council to establish trust. • Lead cross-departmental projects to showcase leadership potential.
Transitioning From the Private Sector Business, finance, or consulting professionals moving into municipal leadership.	• Learn municipal governance, budgeting, and public accountability structures. • Highlight transferable skills in operations, efficiency, and strategic planning. • Engage with Council, staff, and residents to build credibility.
Moving from Nonprofit Leadership Community-focused professionals bringing stakeholder engagement skills.	• Develop financial and operational management expertise. • Showcase experience in community engagement and policy advocacy. • Align with public service values, such as transparency and accountability.
Military Leadership to Local Government Veterans leveraging leadership, crisis management, and operational experience.	• Adapt from directive to collaborative leadership. • Understand political dynamics and working with elected officials. • Develop public engagement and stakeholder management skills.
Transitioning from Other Orders of Government Professionals from Provincial, Federal, or Indigenous governments entering the municipal sector.	• Understand the unique governance, service delivery, and political context of municipalities. • Translate policy and intergovernmental experience into local implementation strategies. • Build relationships with Council, staff, and the community to foster local trust.

Transitioning from Other Sectors

CAOs come from a variety of professional backgrounds, each offering unique strengths—and facing distinct transition challenges.

- **Identify and address key learning gaps** (e.g., public-sector accountability for private-sector leaders, financial literacy for nonprofit or academic professionals).
- **Leverage core strengths**, such as strategic thinking, stakeholder engagement, or technical expertise, to demonstrate value early on.
- **Invest in leadership and governance development** to align with Council expectations and municipal decision-making processes.

CAO Pro Tip: Find a Mentor and Build a Support Network

The CAO role can be both demanding and isolating, making a strong professional network essential. Connecting with seasoned CAOs, engaging in municipal peer groups, and participating in leadership forums provides mentorship and real-world governance insights. A well-established network offers guidance, support, and career opportunities—ensuring you're never navigating challenges alone.

Case Study: From Private Sector Executive to Municipal CAO

John, a senior executive in the private sector, led operations and strategic growth for a national logistics firm. Seeking a community-focused role, he applied for a CAO position in a mid-sized municipality.

Despite his financial and operational expertise, John faced key challenges:

- **Public Accountability & Governance:** He had to adapt to Council decision-making and stakeholder engagement.
- **Slower Processes:** Unlike the private sector, municipal governance required patience with regulatory and bureaucratic procedures.
- **Building Credibility:** Staff were initially skeptical of his lack of municipal experience.

Success Strategies:

- Studied municipal governance through professional development and mentorship.
- Built trust with Council by providing clear, transparent recommendations.
- Engaged staff and the community to understand local needs.
- Applied private-sector efficiencies while respecting public-sector constraints.

Within two years, John earned Council and staff trust, improved financial planning, and enhanced municipal operations—proving that strong leadership, adaptability, and a commitment to learning can make for a successful transition into municipal leadership.

GOVERNANCE, LEADERSHIP & COUNCIL RELATIONS

As a Chief Administrative Officer (CAO), your success depends on effectively navigating the governance and political landscape of local government. While not an elected official, you operate at the intersection of politics and administration, requiring a deep understanding of governance structures, legislative responsibilities, and collaboration with elected officials.

Your core responsibilities include:

- Implementing Council decisions and overseeing municipal operations.
- Providing professional, evidence-based advice while ensuring compliance with legislation and policies.
- Maintaining neutrality while fostering strong Council-administration relations.

A well-functioning CAO-Council relationship **sets the tone for municipal success**. When clear roles, effective communication, and mutual respect exist, the municipality operates efficiently, and political tensions are minimized.

CAO Insight: Bridging Data and Narrative

As CAO, you're often the bridge between staff-driven data and Council's more narrative- and values-based approach to decision-making. In smaller municipalities, personal stories and community sentiment may influence decisions as much as—or even more than—technical data. In larger municipalities, data might carry more weight, but relatable stories still help ground decisions in real-life impact.

Staff are trained to value facts and analysis; elected officials often respond to stories, symbols, and relationships. Both are valid. Tailor your communication to reflect your municipality's size, culture, and Council's preferences. Pair evidence-based recommendations with local context or a compelling human story to support more resonant—and effective—decision-making.

Council Meetings: Where Governance Comes to Life

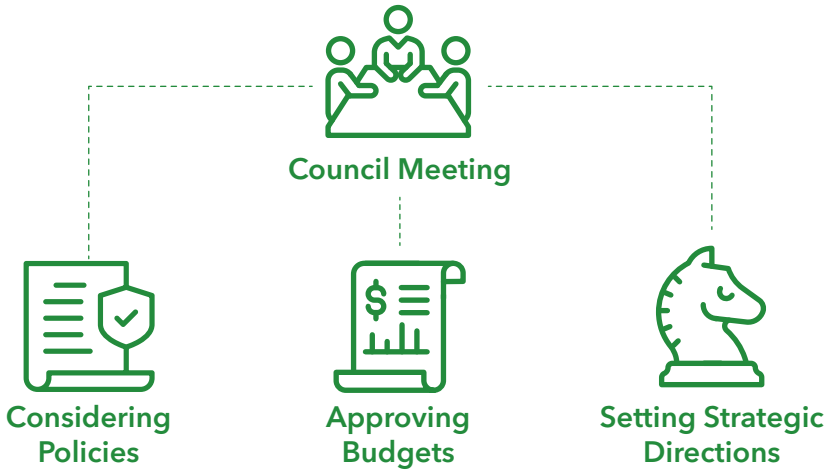
For a CAO, Council meetings are the stage where governance becomes reality. These formal public sessions are where elected officials consider policies, approve budgets, and set the strategic direction for the municipality. As CAO, you play a vital role in advising Council, facilitating informed decision-making, and ensuring that recommendations align with both operational realities and Council's long-term vision. You will be responsible for presenting key reports, providing context, and guiding discussions with professionalism and neutrality.

Council meetings generally include open (public) sessions where residents, media, and stakeholders can observe and participate, as well as closed (in-camera) sessions for confidential matters such as human resources, legal issues, or land negotiations. Delegations—residents or interest groups—may also address Council directly. The City Clerk plays a critical role in ensuring the meeting follows proper legislative procedures, records are accurate, and agendas are effectively coordinated – making them an essential partner to both the CAO and Council. Your role extends beyond the technical; you are also the bridge between Council and the municipal organization, helping to keep meetings efficient and constructive while safeguarding staff from political pressures.

Success in the Council Chamber hinges on preparation, political acumen, and the ability to remain composed under scrutiny. Whether navigating difficult questions, supporting the Mayor in chairing the meeting, or managing complex Council dynamics, your influence as CAO helps foster effective governance and a respectful decision-making environment.

CAO Pro Tips:

- Prepare thoroughly—anticipate questions.
- Keep advice neutral and solutions focused.
- Support the Mayor/Chair in keeping meetings efficient and respectful.
- Debrief with your leadership team afterward to plan next steps.



Governance vs. Administration: Defining Roles

One of the most critical success factors for a Chief Administrative Officer (CAO) is understanding and maintaining the distinction between governance and administration. Governance refers to the role of Council in setting the municipality's strategic direction, while administration involves the CAO's responsibility for implementing Council's decisions and overseeing day-to-day operations.

Without clear boundaries, challenges such as governance overreach, operational interference, and misaligned expectations can arise, leading to inefficiency and conflict. Defining and reinforcing these roles is essential for effective municipal leadership.

CAO Pro Tip: Clarify Your Public Role Early

Every community has different expectations of the CAO's public presence. In some municipalities, the CAO is highly visible—regularly engaging with the media, speaking at public events, and representing operational matters. In others, the CAO remains behind the scenes while the Mayor or Communications staff serve as the public voice. Neither model is right or wrong—it depends on the preferences of Council, the CAO's style, and the needs of the organization. Consider having a deliberate discussion with Council early in your tenure to clarify expectations. Aligning on this dynamic from the outset helps avoid confusion, reinforces role boundaries, and supports a unified public message.

Public Communications and Media Roles

In most municipalities, the Mayor is the official spokesperson to the media and the public. As CAO, maintain professionalism by deferring to this governance role and speaking publicly only when explicitly delegated. Ensure that any public comments align with Council's collective direction. Navigating media boundaries with clarity reinforces the distinction between governance and administration and protects the neutrality of the CAO role.

CAO Pro Tip: Speak Respectfully to Strengthen Trust

As CAO, your words carry weight—both inside and outside Council Chambers. Always speak respectfully about elected officials, even during challenging times or in informal settings like public events, social gatherings, or mixed company. Avoid venting or sharing frustrations publicly. Upholding the reputation of your Council reinforces institutional trust, strengthens public confidence in local government, and safeguards your own leadership credibility. Maintaining a tone of professionalism—no matter the environment—is essential to your role as a neutral and trusted leader.

Council vs. CAO: Who Does What?

Council's Role	CAO'S Role
Sets strategic direction, through policies, bylaws, and budget approval.	Implements Council's vision and oversees daily operations.
Makes final decisions based on public input and staff recommendations.	Provides data-driven advice to inform policy decisions. Your role as CAO is not to sway outcomes but to ensure Council has the clearest, most balanced information available. Present recommendations grounded in evidence, but ensure Council sees a full range of implications and options. Democracy thrives when decisions are made transparently and with context.
Engages with residents and stakeholders to represent community interests.	Ensures administrative feasibility of Council priorities.

CAO Pro Tip: Reinforce these role distinctions through structured Council orientation, ongoing training, and regular check-ins to prevent governance challenges and ensure smooth operations.

Interpreting Legal Advice: Judgment, Ethics, and Leadership

Legal counsel is a critical resource for CAOs, but their advice should be viewed as one perspective—not an absolute directive. As CAO, your responsibility is to weigh legal input alongside ethical standards, Council's values, organizational culture, and your own professional judgment.

Always ask: Is this advice aligned with how we want to lead?

- **Understand the Role of Legal Counsel:** Lawyers provide advice – not instructions. Their recommendations must be interpreted within the context of your municipality's unique environment and risk tolerance.
- **Know When to Engage:** Not every issue requires immediate legal input. Consider whether you're navigating a significant organizational risk or a localized issue better addressed through internal processes or policy.
- **Use Multiple Lenses:** Labour relations and conduct matters often benefit from second opinions – whether from human resources experts, mediators, or Integrity Commissioners. Interpret advice through the lens of fairness, values, and the kind of employer you aspire to be.
- **Legal ≠ Always Right:** What's legally defensible may not be the best path forward. Strive for outcomes that are not only compliant, but also principled, respectful, and aligned with community expectations.
- **Statutory Interpretation:** For legislation like the *Municipal Government Act*, start by consulting provincial resources, associations, or ministries before defaulting to external legal advice.
- **Balance Risk Tolerance:** Lawyers, like all professionals, bring their own bias – some may be highly risk-averse or overly litigious. Use your judgment when faced with advice that escalates conflict or encourages termination without broader consideration.
- **Leadership Style Matters:** There is no universal CAO archetype. Choose the leadership approach that reflects your values, staff expectations, and Council's working culture.

CAO Pro Tip: If you are negotiating contract terms, performance evaluation processes, or need third-party support to navigate CAO-Council relations, refer to **CAMA's CAO Employment Contract Toolkit** for best practices and model clauses.

CAO Pro Tip: Legal advice should inform—not define—your decisions. Blend legal counsel with emotional intelligence, political acuity, and your deep knowledge of the organization to arrive at sound, ethical outcomes.

The Political Nature of the CAO Role

Although the Chief Administrative Officer (CAO) is a non-political position, it operates within an inherently political environment. CAOs must navigate competing interests, public scrutiny, and shifting priorities while maintaining neutrality and professionalism.

Success in this role requires political acuity—the ability to understand the pressures influencing Council decisions without becoming entangled in them. A politically astute CAO balances the demands of governance with the need for impartial, evidence-based administration.

Key Traits of a Politically Astute CAO:

- Provides objective, evidence-based recommendations while respecting Council's decision-making authority, ensuring they receive a complete and balanced overview of the information and available options. The CAO's role is to guide decision-making, not to lead Council through the content of reports.
- Manages public perception by ensuring transparency in governance and operations.
- Anticipates political shifts and adjusts communication strategies accordingly.
- Frames advice strategically to help Council make sound, defensible decisions.

CAO Pro Tip: While remaining politically aware is essential, a CAO must always uphold neutrality, avoiding the perception of bias or favoritism.

Understanding political dynamics is only part of the challenge—CAOs must also anticipate and mitigate common governance risks.

Common Political Challenges & How to Handle Them

Even in well-functioning municipalities, political dynamics can present challenges for a CAO. From Council overreach to public scrutiny, these obstacles require a strategic and measured approach. Successfully managing governance challenges helps maintain operational efficiency, preserve professional boundaries, and ensure long-term municipal stability.

The table below outlines common political challenges CAOs encounter and proven strategies for addressing them:

Challenge	Solution
Council Interference in Operations	Reinforce governance vs. administration roles through training and procedural clarity.
Divided Council with Conflicting Agendas	Provide consistent, fact-based information to all members to ensure unbiased decision-making.
Micromanagement from Mayor or Council Members	Establish clear communication protocols, ensuring direction comes from Council as a whole, not individuals.
Public Pressure & Social Media Criticism	Maintain transparent, factual communication and avoid engaging in online conflicts.

CAO Pro Tip: Establish clear governance frameworks early on to prevent political challenges on role clarity from escalating. Regular training, open communication, and a strong CAO-Council relationship are key to mitigating political risks. Equally important is the implementation of key policies—such as Conflict of Interest, Social Media, and Respectful Workplace—along with a well-crafted Procedural Bylaw that thoughtfully anticipates and addresses these issues.

Building Effective Council Relationships

A strong CAO-Council relationship is essential for effective municipal governance. Without trust, collaboration, and open communication, the municipality risks inefficiency, operational dysfunction, and increased political tension. A well-aligned CAO and Council work together to ensure that strategic decisions are implemented effectively while maintaining professional boundaries.

The CAO plays a critical advisory role, bridging Council's political priorities with municipal administration. However, this relationship must be built on mutual respect, transparency, and professional integrity to function effectively. When trust is lacking, governance becomes reactionary, and municipal progress is hindered.

CAO Pro Tip: The often-cited "no surprises" rule isn't about perfection – it's about building trust through open, timely, and proactive communication. As CAO, aim to keep Council well-informed on emerging issues, risks, and key developments before they surface publicly. In return, Council should respect your operational leadership and provide space for the administration to manage day-to-day affairs. This mutual understanding fosters a professional, collaborative working relationship rooted in transparency and trust.

Strategies for Building a Strong CAO-Council Relationship

- **Align with Council Priorities** – Understand strategic goals, budget constraints, and political realities while maintaining professional integrity.
- **Foster Open Communication** – Use regular updates, one-on-one meetings, and clear reporting to keep Council informed.
- **Act as a Trusted Advisor** – Deliver well-informed, balanced recommendations that integrate political awareness with sound ethical governance principles. Ensure Council receives comprehensive information and a range of viable options to support effective decision-making.
- **Support Informed Decision-Making** – Help Council understand the operational impacts of their decision, using data, legal analysis, and strategic foresight.

A well-functioning CAO-Council relationship reduces political friction, improves municipal stability, and ensures that governance and administration remain aligned.

Strategic Governance Planning & Political Acumen

A CAO operates at the intersection of governance and administration, ensuring that Council's policy direction is effectively translated into municipal operations. However, this role requires more than just technical expertise—it demands political acumen, the ability to navigate political dynamics while maintaining neutrality and professional integrity.

Political acumen is not about engaging in politics but rather understanding the environment in which decisions are made. A CAO must anticipate challenges, manage competing interests, and strategically present information to help Council make informed, defensible decisions.

Key Strategies for Political Acumen:

- **Understand Individual Council Members** – Learn their motivations, priorities, and decision-making styles.
- **Navigate Conflicts Constructively** – Identify tensions early and use mediation techniques to keep discussions productive.
- **Frame Advice Strategically** – Present recommendations with political awareness while upholding ethical governance. Ensure Council is provided with all relevant information and options for consideration in addition to the recommendation.
- **Maintain Adaptability** – Political landscapes change—adjust leadership approaches accordingly.

CAO Pro Tip: A politically astute CAO influences without overstepping, advises without bias, and leads without political entanglement.

For a deeper dive into these principles, explore **CAMA's Political Acumen Toolkit**.

Political acumen requires situational knowledge across a diversity of municipal landscapes. However, there are some truths that apply throughout. Here are the top 10 ways to demonstrate political acuity:

CAMA'S Top Ten Tips for Political Acumen

1. **Integrity:** Maintaining your integrity is crucial to achieving success as a CAO. This rings true in all of your actions as well as supporting ethical behaviour on the part of your elected officials.
2. **Roles:** Council, the CAO and other Senior Administrators must all have a clear grasp of their role in municipal governance. Council orientations, training, and mentorship are key to understanding the boundaries and mitigating the risk that comes with blurred lines between roles.
3. **Priorities:** As a CAO your actions should be aligned with those of Council. Take the time to learn what Council's priorities are, and do not be afraid to clarify if needed.
4. **Trust:** Establishing trust is a cornerstone of leadership and lays the foundation of political acumen. Trust is not a given and must be earned through your actions.
5. **Respect:** Even if you do not agree with your political leaders or the decisions they make, you must always respect them and demonstrate this respect to your staff and the public.
6. **Transparency:** Maintain a culture of no surprises and no secrets between you and your Council. Being transparent and honest is vital to building relationships that will support your career now and into the future.
7. **Relationship-Building:** Work at building rapport at all levels. Whether it is your staff, your Council, your municipal neighbours, the media, or interactions at the provincial and federal levels, relationship-building goes a long way toward achieving the goals of your municipality.
8. **Neutrality:** Leave the politics to the politicians. The role of CAO is to remain neutral on issues while offering the best advice possible to the elected officials making the decision and providing leadership to other municipal staff.
9. **Communication:** Communication is not only what you say but what you hear. Take the time to listen to Council, residents and other stakeholders to truly understand where they are coming from and be honest in the information you provide. Be open and respectful in your discussions with Council and never take anything personally.
10. **Feedback:** Do not be afraid to ask for feedback. Meeting with your Council formally and informally can help ensure you are aligned with the strategic plan they have set for the municipality. Finding a mentor can also be a valuable resource for working through challenging situations and having someone to go to for support.

Case Study: Navigating Political Acumen in a Divided Council

A newly elected Council was sharply divided on key policy issues, creating tensions that risked governance paralysis. The CAO faced the challenge of managing competing interests while maintaining neutrality and ensuring that municipal operations remained stable.

The CAO's Approach

- **Understanding Individual Council Members** – The CAO held one-on-one meetings to learn each Councillor's priorities, concerns, and communication styles.
- **Navigating Conflicts Constructively** – Instead of allowing debates to escalate, the CAO framed issues in a fact-based, solution-oriented manner and encouraged collaboration.
- **Framing Advice Strategically** – Reports were structured to present clear data-driven recommendations, emphasizing long-term municipal impacts over political differences.
- **Maintaining Neutrality** – The CAO reinforced the importance of evidence-based decision-making, ensuring discussions remained professional rather than political.

Results & Key Takeaways

- **Improved Council Collaboration** – By focusing on common goals rather than divisions, the CAO helped Council work toward consensus.
- **Reduced Political Tensions** – A "no surprises" approach ensured Council received timely and balanced information.
- **Stronger Governance Practices** – The CAO's commitment to neutrality and relationship-building strengthened trust and decision-making processes.

CAO Pro Tip: Political acumen is about understanding the dynamics at play, managing relationships effectively, and providing impartial leadership that fosters sound governance.

The Importance of Strategic Planning and CAO Goal Setting

Strategic Planning: A Foundation for CAO-Council Alignment

One of the most important early initiatives a CAO can champion with a new Council is facilitating the development of a strategic plan. Ideally, this is initiated during Council Orientation or shortly thereafter. A Council-endorsed strategic plan provides clear priorities, direction, and a shared vision for the municipality over the Council's term. It forms the cornerstone of effective governance and serves as a vital tool to align Council's aspirations with the municipality's operational capacity.

The strategic plan helps ensure that Council focuses on "what" should be achieved (policy and priorities), while the CAO and staff determine "how" those goals will be implemented. Without a clear plan, the risk of shifting priorities, misaligned expectations, and governance challenges increases significantly. As CAO, you play a key role in guiding Council through this process—whether by facilitating the development internally, engaging an external consultant, or coordinating with governance experts. **However, it's important to consider that facilitating the process internally may be perceived by some Councils as a way to engineer a predetermined outcome. To maintain trust and transparency, it may be advisable to engage an external facilitator to remove any perception of bias.**

CAO Goal Setting: Operationalizing the Strategic Plan

Once Council has established its strategic plan, it becomes the foundation for setting the CAO's personal and organizational goals. As CAO, your mandate is to translate strategic objectives into actionable priorities for the municipal administration. This includes:

- Developing annual or multi-year CAO goals directly aligned with Council's Strategic Plan.
- Cascading these goals into Mandate Letters or Performance Agreements with your senior leadership/director team to ensure alignment throughout the organization.
- Building a results-focused culture where individual and departmental objectives are linked to broader municipal priorities.
- **Establishing a regular schedule to review progress on the strategic plan**. For example, some municipalities develop a detailed action plan and provide progress updates to Council every six months. Regular reporting fosters transparency, accountability, and helps maintain momentum on key initiatives.

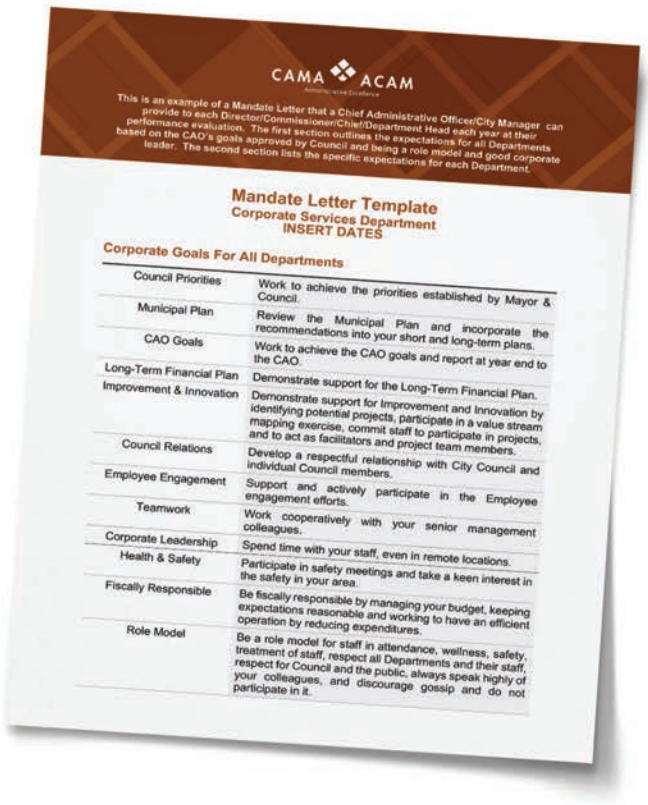
The Role of Mandate Letters

Mandate Letters formalize expectations and key deliverables for each director or senior leader, reinforcing how their department contributes to Council's strategic priorities. These letters clarify accountability, focus efforts on Council-endorsed outcomes, and provide a framework for performance evaluation discussions.

Linking strategic planning to the CAO and staff goals provides several key benefits for the municipality. It creates clarity and focus by ensuring that every level of the organization is aligned and working toward the same Council-endorsed objectives. This alignment enhances accountability by establishing clear benchmarks for performance discussions between Council and the CAO, as well as within the senior leadership team. A strong connection to the strategic plan also builds organizational resilience, enabling the municipality to stay on course even during periods of political or operational uncertainty. Ultimately, this approach fosters operational excellence by driving service delivery improvements, encouraging innovation, and supporting effective resource prioritization.

CAMA offers a sample Mandate Letter and Performance Evaluation template for direct reports, available on the **CAMA website**.

CAO Pro Tip: Start goal-setting conversations with your leadership team early in the budget cycle, linking department objectives to the financial plan. This ensures resource allocation supports Council's strategic vision.



CAMA ACAM

This is an example of a Mandate Letter that a Chief Administrative Officer/City Manager can provide to each Director/Commissioner/Chief/Department Head each year at their performance evaluation. The first section outlines the expectations for all Departments based on the CAO's goals approved by Council and being a role model and good corporate leader. The second section lists the specific expectations for each Department.

Mandate Letter Template
Corporate Services Department
INSERT DATES

Corporate Goals For All Departments

Council Priorities	Work to achieve the priorities established by Mayor & Council.
Municipal Plan	Review the Municipal Plan and incorporate the recommendations into your short and long-term plans.
CAO Goals	Work to achieve the CAO goals and report at year end to the CAO.
Long-Term Financial Plan	Demonstrate support for the Long-Term Financial Plan.
Improvement & Innovation	Demonstrate support for Improvement and Innovation by identifying potential projects, participate in a value stream mapping exercise, commit staff to participate in projects, and to act as facilitators and project team members.
Council Relations	Develop a respectful relationship with City Council and individual Council members.
Employee Engagement	Support and actively participate in the Employee engagement efforts.
Teamwork	Work cooperatively with your senior management colleagues.
Corporate Leadership	Spend time with your staff, even in remote locations.
Health & Safety	Participate in safety meetings and take a keen interest in the safety in your area.
Fiscally Responsible	Be fiscally responsible by managing your budget, keeping expectations reasonable and working to have an efficient operation by reducing expenditures.
Role Model	Be a role model for staff in attendance, wellness, safety, treatment of staff, respect all Departments and their staff, respect for Council and the public, always speak highly of your colleagues, and discourage gossip and do not participate in it.

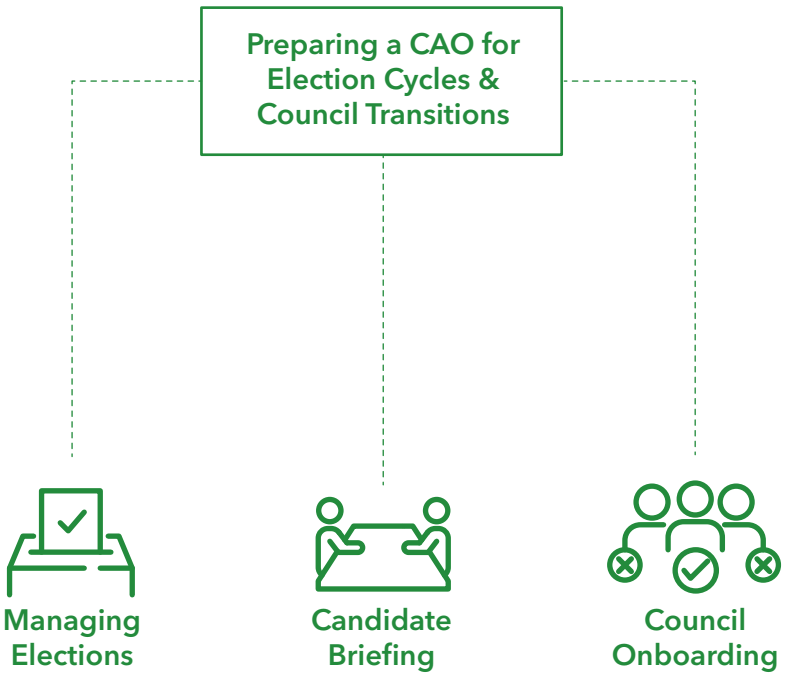
Preparing for Election Cycles & Council Transitions

Election cycles bring both opportunity and uncertainty for municipalities. A CAO must take a proactive and strategic approach to maintain continuity, stability, and effective governance—before, during, and after elections. Whether managing candidate briefings, onboarding new Councils, or maintaining neutrality during campaign seasons, careful planning is essential.

In Canada, municipal elections are governed by provincial and territorial legislation, with election dates and processes varying by jurisdiction. Some municipalities conduct their own elections, while others follow provincially managed frameworks. Understanding the legal and procedural requirements in your region is critical to preparing for smooth transitions and preventing operational disruptions.

CAO Pro Tip: Treat election cycles as an opportunity for renewal—well-prepared transitions set the stage for strong governance and a productive Council term.

This section will explore practical strategies to help CAOs manage elections, candidate briefings, and Council onboarding effectively.



Navigating Campaign Seasons & Candidate Briefings

Election periods are highly sensitive times for municipalities, requiring strict neutrality and careful communication from the CAO and administrative staff. A well-managed campaign season ensures fairness, transparency, and continuity of municipal operations while preventing any perception of bias or political involvement.

Maintaining Professionalism & Neutrality During Campaigns

To uphold the integrity of the CAO role:

- **Establish Clear Protocols for Candidate Inquiries** – Ensure all candidates receive the same factual, publicly available information to prevent favoritism or misinformation.
- **Avoid Perceptions of Bias** – Refrain from actions, comments, or decisions that could be interpreted as supporting or opposing any candidate. Equal access to information must be maintained.
- **Remind Staff of Their Obligation to Remain Apolitical** – Municipal employees must continue delivering services impartially and avoid engaging in campaign discussions during work hours.
- **Manage Public Communication Carefully** – Ensure that all official municipal communications remain neutral and fact-based. Avoid issuing statements that could be seen as influencing voter perception.

CAO Pro Tip: Develop an internal election protocol outlining how the administration will handle candidate requests, public statements, and campaign-related inquiries.

Candidate Briefings: Setting the Stage for Good Governance

Providing pre-election briefings and key municipal information to candidates ensures that incoming elected officials understand priorities, governance processes, and operational realities. This proactive approach reduces the learning curve and fosters informed decision-making from day one.

Key Steps for Effective Candidate Briefings

- **Develop Key Information Packages** – Provide essential materials outlining the municipality's strategic plan, financial overview, major projects, and governance framework.
- **Ensure Neutrality & Transparency** – Offer the same information to all candidates to reinforce municipal impartiality and prevent any perception of favoritism.
- **Clarify the CAO's Role** – Educate candidates on the clear distinction between governance (Council's role) and administration (CAO's role) to set expectations early.
- **Offer a Candidate Information Session** – If appropriate, organize a general session where all candidates can receive an overview of the municipality's operations and governance structure.

CAO Pro Tip: Direct election candidates to publicly available resources (Council agendas, budgets, strategic plans, etc.) rather than engaging in one-on-one discussions that could be misinterpreted.

By managing campaign seasons with professionalism, consistency, and neutrality, CAOs help maintain municipal stability while preparing for a smooth transition to a new Council.

Transition Planning & Onboarding New Councils

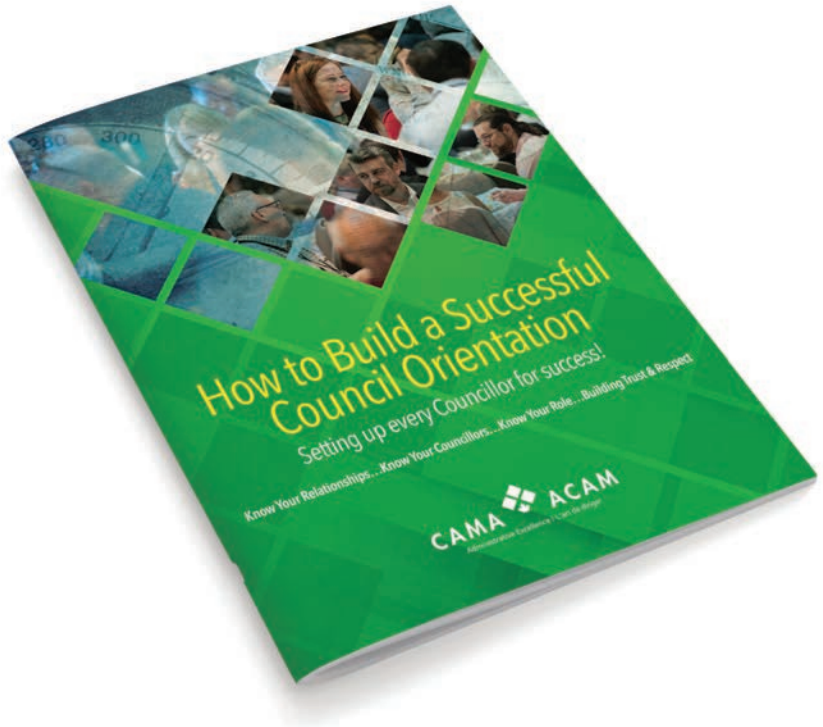
A well-structured transition and orientation process is essential for ensuring municipal stability, setting new Council members up for success, and fostering a productive CAO-Council relationship from day one. Without proper onboarding, newly elected officials may struggle to understand governance responsibilities, leading to inefficiencies and unnecessary conflict.

By implementing a proactive transition plan, CAOs can help new Councils quickly acclimate to their roles, align with strategic priorities, and build strong working relationships that support effective governance.

Key Steps for a Smooth Council Transition

- **Orientation Sessions** – Conduct structured onboarding programs covering governance roles, legislative responsibilities, budget processes, and strategic priorities. **CAMA's Council Orientation Toolkit** can be a valuable resource for guiding this process.
- **Develop a Council Handbook & Training Plan** – Provide practical tools such as policy documents, procedural guides, financial overviews, and introductions to senior staff to ensure elected officials fully understand their roles and obligations.
- **Build Early Relationships** – Establish open lines of communication early through one-on-one meetings, strategic planning sessions, and informal discussions to foster trust and collaboration.
- **Ensure Operational Continuity** – Maintain clear documentation, continuity plans, and records of past Council decisions to prevent governance disruptions and provide historical context to new members.

CAO Pro Tip: The first 90 days of a new Council's term are crucial. Invest time in structured orientation and relationship-building to set the foundation for effective governance. Engage a third-party expert early in the term to support orientation delivery—bringing neutrality, clarity, and credibility to discussions on roles, responsibilities, and good governance practices. A well-facilitated start promotes alignment, prevents future conflict, and builds mutual trust between Council and administration.



Managing Council Turnover

When a new Council is elected, the first interactions between the CAO and Council members set the tone for the entire term. Quickly establishing trust, credibility, and alignment with governance best practices ensures a smoother transition and more effective decision-making.

Strategies for Building Strong Relationships with a New Council

- **Engage with Council Members Individually** – Meet one-on-one with each member to understand their priorities, concerns, and leadership styles while reinforcing the CAO's impartiality.
- **Provide a Clear Roadmap** – Develop a structured overview of ongoing municipal projects, financial status, key governance policies, and strategic priorities.
- **Facilitate Strategic Planning** – Support Council in setting long-term priorities by guiding discussions on governance best practices, and operational feasibility.
- **Encourage Governance Training** – Offer Council development sessions on legislative responsibilities, governance principles, and municipal operations to create a shared foundation for success.

CAO Pro Tip: Early engagement with a new Council helps build trust, manage expectations, and align priorities for effective governance.

Maintain Stability & Good Governance

A CAO serves as the critical bridge between administration and elected officials, ensuring municipal operations remain professional, transparent, and aligned with Council's strategic direction—all while maintaining neutrality and resisting political pressures.

By proactively managing governance relationships, reinforcing strategic priorities, and upholding ethical leadership, CAOs can sustain municipal stability and drive long-term success.

How Council Can Support a Successful CAO Transition

While much of the CAO transition process is driven by administrative leadership, Council plays an equally vital role in setting the tone for a new CAO's success. The early days of a CAO's tenure are a critical window to build trust, foster positive relationships, and align on governance expectations. Council's engagement in this process not only strengthens the working relationship but also contributes to the long-term success of the organization.

Appendix F provides a handout specifically for Council members on how they can champion a smooth onboarding and integration process for their new CAO.

The Importance of Performance Evaluations for CAOs

A CAO's performance evaluation is more than a routine review – it's a strategic tool for success. A structured evaluation process clarifies expectations, strengthens communication with the Mayor and Council, and ensures alignment with municipal priorities.

CAMA's CAO Performance Evaluation Toolkit was developed to support CAOs and Councils in building a strong working relationship. Performance conversations should be an ongoing process, not just an annual event, helping both parties work toward a shared vision and strategic goals.

This flexible, customizable Toolkit offers best practices to make performance management fair and effective. It supports:

- CAOs and Councils new to the evaluation process.
- CAOs and Councils refining an existing process with new best practices.

A Three-Step Process

1. **CAO Prepares** – Provides an Information Package and agrees on the process with Council.
2. **Council Reviews & Evaluates** – Reviews the CAO's self-evaluation, provides feedback, and compiles a final report.
3. **Discussion & Goal Setting** – CAO and Council meet to discuss results, establish future goals, and finalize the report.

Why Performance Evaluations Matter

- Gain constructive feedback on leadership and operations.
- Align with Council's strategic goals.
- Identify areas for improvement and set measurable objectives.
- Build trust and accountability with elected officials.
- Ensure fair, transparent discussions on compensation and career growth.

Unlike a traditional review, a CAO evaluation is a two-way conversation—your opportunity to share insights on challenges, progress, and strategic needs. Ongoing performance discussions strengthen collaboration and prevent misunderstandings.

CAMA Recommendation: To prevent bias and ensure a fair evaluation, CAMA strongly recommends using a neutral third-party facilitator to oversee the CAO performance evaluation process. This approach enhances credibility, fosters transparency, and prevents conflicts of interest.

360-Degree Feedback Considerations

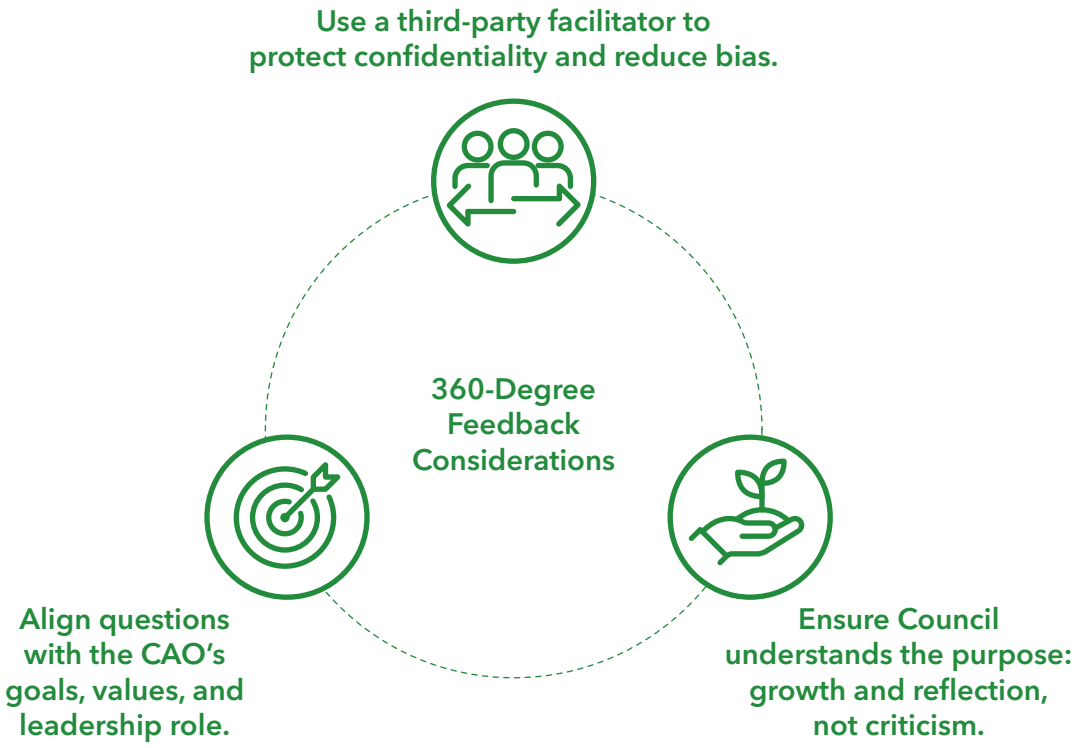
Some municipalities incorporate 360-degree feedback into the CAO's performance evaluation. While this tool can offer valuable insights from Council, staff, and external partners, it should be approached with caution. To ensure integrity and constructive outcomes:

- Use a third-party facilitator to protect confidentiality and reduce bias.
- Align questions with the CAO's goals, values, and leadership role.
- Ensure Council understands the purpose: growth and reflection, not criticism.

360s can be a helpful component of a broader leadership development plan but should not replace the formal CAO performance review process.

Click **here** to learn the "Top 10 Reasons Why A Council Should Conduct A CAO Performance Evaluation".

CAO Pro Tip: Be proactive about your annual performance review—schedule it if needed and come prepared. Present a clear summary of your achievements tied to Council's priorities, anticipate feedback, and approach the discussion as a two-way conversation. Clarify expectations for the year ahead and use the opportunity to discuss your professional development. Stay open, professional, and solution-focused throughout.



Case Study: When a CAO Performance Evaluation Goes Off the Rails

The CAO's annual performance evaluation was intended to be a structured and fair process. However, poor execution and political interference undermined the integrity of the evaluation, leading to distrust between the CAO and Council.

What Went Wrong?

- **The Mayor Controlled the Process** – Instead of allowing all Councillors to provide input, the Mayor collected the evaluation data and only submitted their personal opinions, misrepresenting Council's collective feedback.
- **Lack of Transparency** – The CAO was never given access to all feedback collected, leaving them unable to address concerns or misunderstandings.
- **Compensation Bias** – Council members decided not to give the CAO a raise, citing that they did not want the CAO to earn more than them, rather than basing the decision on performance or market comparisons.

Consequences

- **Erosion of Trust** – The CAO lost confidence in the evaluation process and questioned the Council's integrity.
- **Low Morale & Retention Risk** – Feeling undervalued, the CAO considered leaving the organization, which would have caused leadership instability.
- **Damaged CAO-Council Relationship** – The lack of professionalism in the evaluation created ongoing tension and dysfunction between the CAO and elected officials.

Lessons Learned & Best Practices

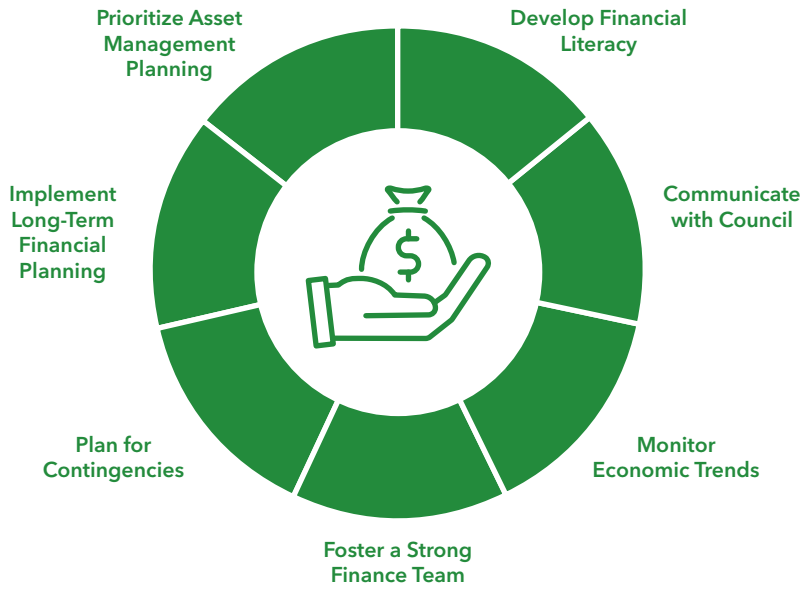
- **Use a Third-Party Facilitator** – To ensure fairness and credibility, CAMA recommends engaging an independent consultant to oversee the CAO evaluation process.
- **Maintain Transparency** – Councillors should have equal participation, and the CAO must have access to all collected feedback.
- **Base Compensation on Performance & Market Data** – Salary decisions should reflect merit and industry standards, not political considerations.

Key Takeaway: A structured, unbiased performance evaluation strengthens governance, improves CAO-Council relations, and enhances municipal leadership.

FINANCIAL AND LEGAL RESPONSIBILITIES

As a new Chief Administrative Officer (CAO), understanding municipal finance and legal responsibilities is critical to ensuring financial stability, risk management, and compliance with legislation. While finance teams and legal counsel handle many details, the CAO is ultimately responsible for overseeing financial policies, ensuring budget alignment with Council priorities, and safeguarding the municipality from legal and financial risks.

Key Financial Management Tips for a New CAO



1. **Develop Financial Literacy:** Learn municipal accounting principles to interpret budgets and financial reports.
2. **Communicate with Council:** Provide clear, fact-based updates on financial health, risks, and opportunities.
3. **Monitor Economic Trends:** Stay ahead of market conditions, inflation, and revenue changes that impact budgets.
4. **Foster a Strong Finance Team:** Build a collaborative relationship with the Finance Director for expert advice.
5. **Plan for Contingencies:** Maintain reserve funds to mitigate unexpected expenses or revenue shortfalls.
6. **Implement Long-Term Financial Planning:** Develop and regularly update a long-term financial plan that aligns with strategic priorities and ensure fiscal sustainability over time.
7. **Prioritize Asset Management Planning:** Maintain a comprehensive Asset Management Plan to guide infrastructure investment, manage lifecycle costs, and support informed decision-making.

CAO Pro Tip: A financially strategic CAO thinks long-term—ensuring financial policies today support municipal resilience in the future.

Financial Stewardship and Budget Oversight

A municipal budget is more than a fiscal document—it is a strategic plan that drives municipal priorities. Understanding financial reports allows the CAO to provide fact-based recommendations to Council.

Key Budget Oversight Strategies for CAOs

- **Understand Revenue Streams** – Learn how property taxes, grants, and user fees sustain municipal operations.
- **Analyze Expenditures** – Review operating vs. capital budgets, ensuring funds are spent strategically.
- **Track Financial Performance** – Use budget-to-actual comparisons to detect trends early.
- **Collaborate with Finance** – Ensure budget assumptions are realistic and align with municipal goals.
- **Monitor and Support Arrears Collection** – Work with the Finance team to understand trends in tax and fee arrears, support fair and timely collection practices, and ensure strong cash flow for municipal priorities.

Financial Statements: What to Watch For

- **Balance Sheet** – Identifies assets, liabilities, and reserves.
- **Cash Flow Statement** – Measures liquidity to handle expenses.
- **Audit Reports** – Highlights financial risks and areas for compliance improvement.

Red Flag: Revenue Risks

- Over-reliance on unstable grant funding.
- Setting tax rates without long-term planning.
- Delayed infrastructure maintenance increasing long-term costs.
- Year-over-year declines in reserve balances, which may indicate structural budget issues or insufficient long-term planning.
- Rising debt servicing ratios that limit financial flexibility and reduce capacity to respond to emerging priorities or unforeseen events.

Capital Planning and Asset Management

Capital planning ensures that long-term infrastructure needs are met, while asset management maximizes the value and lifespan of municipal assets.

Capital Planning Best Practices

- **Develop a Long-Term Plan:** Work with Council and staff to prioritize infrastructure investments.
- **Engage Stakeholders:** Ensure capital projects align with community needs.
- **Diversify Funding**: Explore grants, reserves, and debt financing to optimize resources.

Municipal Asset Management:

- **Inventory Assets:** Maintain an up-to-date inventory of infrastructure, equipment, and facilities, including their condition and replacement costs.
- **Use Data-Driven Decisions:** Rely on asset management software or tools to prioritize maintenance and replacements based on lifecycle costs and risk assessments.
- **Invest in Preventative Maintenance:** Allocate sufficient budget for preventative maintenance to extend the lifespan of assets and reduce long-term costs.

Municipal Revenue & Funding Models

Municipalities rely on diverse funding models to finance operations and projects. Understanding these models helps you balance revenue generation with community needs.

Grants: Maximizing External Funding

- **Explore Opportunities:** Research federal, provincial, and private grant programs that align with municipal priorities.
- **Build Relationships:** Develop connections with grant administrators to stay informed about upcoming opportunities and changes.
- **Track Compliance:** Ensure that grant-funded projects meet reporting and spending requirements to maintain eligibility.

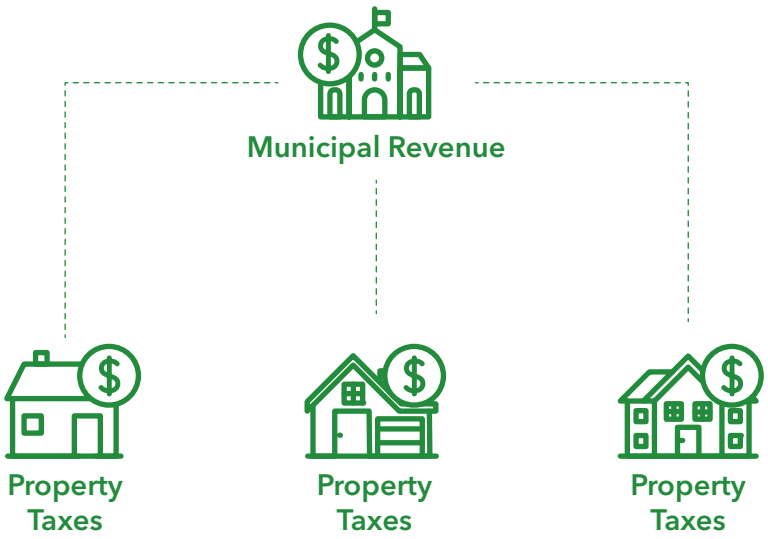
Taxes: Managing Public Expectations

Property taxes are the primary and most stable source of municipal revenue. Understanding the fundamentals—including how mill rates and property assessments work—is essential for CAOs, especially those new to municipal finance.

- **Understand Tax Structures:** Learn how municipal tax revenue is generated through property assessments and mill rates. The **mill rate** is the amount of tax payable per $1,000 of assessed property value and is set by Council based on budgetary needs and service demands.
- **Interpret Assessments:** Understand how property values are assessed by provincial bodies or assessment agencies, and how these values affect tax bills. Be prepared to explain assessment-based changes that may impact residents.
- **Balance Affordability:** Support Council in setting mill rates that fund operations while considering affordability and economic conditions. Work with Finance to explore multi-year tax strategies that avoid large annual fluctuations.
- **Monitor Arrears Collection:** Stay informed about trends in outstanding tax payments. Collaborate with Finance to ensure effective and fair collection processes are in place to protect the municipality's cash flow and promote equity among taxpayers.
- **Communicate Clearly:** Help residents understand where their tax dollars go. Use simple visuals or tax calculators to show the return on investment in public services, infrastructure, and community programs.

CAO Pro Tip: Build Your Property Tax Literacy Early

If you're new to municipal government, take time to understand how assessments, mill rates, and local tax policy, and arrears collection all interact. Connect with your Finance Director or provincial municipal affairs office for foundational resources—they're essential for informed budget discussions and effective public communication.



User Fees: Funding Municipal Services

- Review Fee Structures: Evaluate user fees for services such as water, waste management, or recreational programs. Ensure they are equitable and reflective of service costs.
- Benchmark with Other Municipalities: Benchmark user fees against similar municipalities to maintain competitiveness.
- Engage Stakeholders: Involve the community in discussions about fee changes to build transparency and trust.

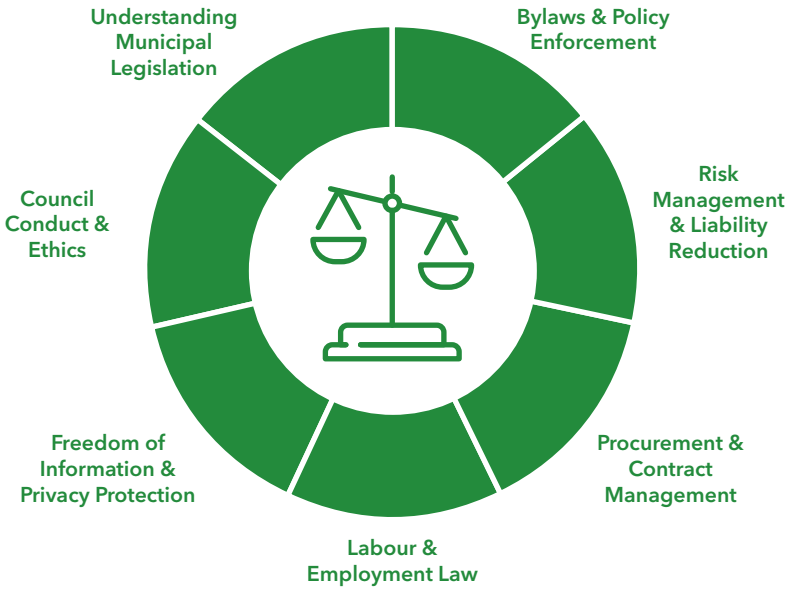
Red Flag: Revenue Risks

- Over-reliance on unstable grant funding.
- Setting tax rates without long-term planning.
- Delayed infrastructure maintenance increasing long-term costs.

Legal Oversight and Risk Management

A CAO is responsible for ensuring municipal compliance with all applicable laws, regulations, and policies. While legal counsel provides guidance, CAOs must understand the key legal risks facing municipalities.

Key Legal Responsibilities of a CAO



1 Understanding Municipal Legislation

- Familiarize yourself with key legislation that governs municipalities in your Province/Territory, such as the Municipal Act, Planning Act, and Local Government Act.
- Ensure compliance with transparency and accountability requirements, including open meeting laws and public disclosure rules.

2 Freedom of Information & Privacy Legislation

- Understand and uphold Freedom of Information and Protection of Privacy (FOI/PIPA/FIPPA) legislation. This includes managing access to records, responding to requests appropriately, and safeguarding confidential and personal information. CAOs from other sectors may find these laws more stringent than corporate or nonprofit environments—seek training if needed.

CAO Pro Tip: Build a Quick-Reference Binder (or Digital Folder)

Compile a personalized binder or desktop folder of your municipality's key legislation, bylaws, and procedural documents. Having easy access to relevant sections during Council meetings or when advising staff saves time, reinforces confidence, and helps you provide clear, accurate guidance in real time.

3 Bylaws and Policy Enforcement

- Oversee the development, implementation, and enforcement of municipal bylaws and policies.
- Work with Council and legal advisors to ensure bylaws align with provincial and federal laws.
- **Establish a review schedule** to regularly assess and update bylaws and policies—ensuring they remain relevant, legally compliant, and reflective of current Council priorities and community needs.

4 Risk Management and Liability Reduction

- Identify potential legal risks in municipal operations and implement risk management strategies.
- Ensure the municipality has appropriate insurance coverage for liability, infrastructure, and staff.
- Maintain accurate records and documentation to support legal compliance.
- Be mindful that all internal communications—including emails, messaging apps, and even informal jokes—may be subject to FOI disclosure. Caution and professionalism in written communication are essential for reducing liability and protecting staff and Council.
- If you use your personal phone for work-related communications, be aware that it may be subject to Freedom of Information (FOI) requests. Maintaining clear boundaries between personal and professional devices can help manage risk and protect your privacy.

Red Flag: Legal Liabilities

- Failing to enforce bylaws consistently.
- Non-compliance with FOI/privacy laws.
- Insufficient documentation in procurement and human resources matters.
- Failing to issue public Requests for Proposals (RFPs) or tenders in accordance with procurement policies and legislation increasing the risk of legal challenges and reputational harm.

5 Procurement and Contract Management

- Ensure that procurement processes align with municipal policies, trade agreements, and public-sector best practices.
- Oversee the review and negotiation of contracts for services, infrastructure projects, and partnerships.

6 Labour and Employment Law

- Ensure municipal policies comply with employment standards, collective agreements, and occupational health and safety laws.
- Work with legal advisors on employment-related matters, such as hiring, terminations, and workplace disputes.

7 Council Conduct & Ethics

- Support Council in adhering to codes of conduct and conflict of interest policies.
- Ensure compliance with Freedom of Information requests.
- Understand the role of Integrity Commissioners, where applicable, as independent advisors on ethical conduct, conflict of interest, and procedural fairness. They can serve as a valuable tool in interpreting legal or ethical grey areas, particularly in politically sensitive environments.

When Should a CAO Consult Legal Counsel?

- ✓ Contract disputes or procurement violations.
- ✓ Employment law matters (terminations, human resources disputes).
- ✓ Freedom of Information (FOI) legal concerns.
- ✓ Land use, zoning, or regulatory challenges.
- ✓ Any matter with reputational or political risk, particularly those involving senior staff or elected officials.

By proactively managing financial and legal responsibilities, CAOs can protect municipal resources, maintain compliance, and foster sustainable growth. Ensuring good governance, risk management, and transparent decision-making strengthens municipal operations and enhances public trust.

CAO Pro Tip: Financial oversight is strategic—focus on long-term planning, and legal compliance is about prevention—mitigate risks before they escalate. Strong communication builds trust—with Council, staff, and the public.

As a CAO, knowing when to engage external legal counsel is a key part of managing risk and ensuring due diligence. While you may rely heavily on internal advice from your senior management team or municipal solicitor (if available), there are situations where external legal expertise is essential. These include complex labour relations matters, procurement disputes, contract negotiations, land development agreements, or any issue with potential legal liability or political sensitivity.

Proactively seeking legal advice—before a problem escalates—can save significant time, resources, and reputational risk. A strong CAO not only knows when to bring in legal expertise but also how to frame questions clearly and collaborate effectively with legal advisors to achieve practical, defensible solutions. Building relationships with trusted legal counsel early on allows you to confidently navigate high-stakes situations.

LEADING WITH CONFIDENCE: YOUR FIRST 100 DAYS AS A CAO

Your first 100 days as Chief Administrative Officer (CAO) are pivotal in shaping your leadership approach and building trust with Council, staff, and the community. Whether you are new to the municipality or advancing from a senior role, this transition period is your opportunity to listen, learn, and lead with intention.

A Flexible Guideline for Your Journey

The "First 100 Days" is designed as a guideline to help orient and support you during your transition. Depending on the size, complexity, and circumstances of your municipality—and where you are in the election cycle—this process may take more or less time. However, the recommended phases outlined here are intended to guide you through critical milestones as you establish yourself in your new role and begin to shape the organization's future.

Guiding Principles

- **Listen:** Engage Council, staff, and stakeholders to gather insights and build relationships.
- **Learn:** Gain a deep understanding of the governance structure, financial position, and organizational culture.
- **Lead with Purpose:** Set clear priorities, model strong leadership, and align your actions with Council's vision.

This First 100 Days Plan is a structured roadmap designed to help you navigate this crucial period with confidence and clarity.

Maximizing Your First 100 Days

This initial phase is your chance to lay the groundwork for lasting success. Build trust, gather critical information, and establish your credibility through active listening and meaningful engagement with Council, staff, and the broader community. Focus on understanding the municipality's unique challenges and dynamics, while identifying early wins that generate momentum. Approach your role with intention, adaptability, and a commitment to learning—setting a strong foundation for long-term leadership success.

Your First 100 Days: Three Phases to Guide Your Journey

To help you navigate this important transition, this resource is organized into three chapters, each representing a key phase of your first 100 days:

1. **Build Trust & Learn the Landscape (Days 1-30)**

   This phase focuses on listening and building foundational relationships with Council, staff, and stakeholders. You will gather critical insights into the municipality's operations, governance structure, and community culture to inform your leadership approach.

2. **Build Momentum & Lead with Alignment (Days 31-60)**

   In this phase, you will begin to convert your observations into action. Align your leadership with Council's strategic priorities, address immediate operational needs, and deliver early wins that demonstrate your ability to move the organization forward.

3. **Chart the Course: Shape the Future with Confidence (Days 61-100)**

   With trust established and momentum underway, this phase is about setting the organization on a sustainable path for long-term success. You will formalize action plans, solidify your leadership team, and communicate results that reinforce confidence in your leadership.

Together, these three phases provide a clear, progressive framework to help you transition smoothly, make an early impact, and position yourself and your municipality for lasting success.

CAO Pro Tip: There is no one-size-fits-all leadership style. Every CAO brings their own unique approach shaped by personal values, background, and experience. Whether your style is collaborative, strategic, transformational, or operational, each can be equally effective depending on your municipality's needs and culture. The key is to be authentic in your leadership while staying adaptable to the evolving context of your role and Council dynamics.

Case Study: Taking a Measured Approach in a Complex Environment

When Jane became CAO of a mid-sized municipality facing significant change, she quickly realized that her "First 100 Days" plan would need to be extended. The municipality was navigating post-election dynamics with a newly elected Council, a major infrastructure project, staffing challenges, and a highly engaged community.

Instead of progressing quickly through the first 30 days, Jane spent the first 60 days focused entirely on Phase 1: listening, relationship-building, and assessing the internal and external landscape. She prioritized one-on-one meetings with Council, senior leadership, Union representatives, and key stakeholders. With a new Council still finding its footing and low staff morale, Jane knew that moving too fast could erode trust and create misalignment.

She also made a point of maintaining regular, transparent communication with Council throughout the extended timeline—providing updates, listening carefully to their evolving concerns, and reinforcing that her slower pace was intentional and strategic. This ongoing dialogue helped manage expectations and sustain trust.

By month three, Jane shifted into Phase 2: Building Momentum. Armed with deeper insights into governance, finances, and organizational culture, she was able to identify and address sensitive issues—such as interdepartmental tensions and differing Council priorities—with greater care.

By extending the phases to match the organization's complexity and the post-election environment, Jane fostered stronger relationships and broader buy-in. When she finally moved into Phase 3—well beyond the initial 100 days—her leadership team and Council were aligned, and her early initiatives, such as cross-departmental collaboration, gained solid support. Her flexible approach ultimately set the stage for long-term organizational success.

Lesson Learned

A structured "First 100 Days" plan is a valuable tool, but flexibility is key. Jane's experience highlights how adapting the pace to your municipality's size, complexity, and election cycle can strengthen relationships, improve decision-making, and build a solid foundation for success.

Just as importantly, keeping Council informed of your progress—and the reasons behind any changes to your timeline—reinforces trust, transparency, and collaborative leadership.

PHASE 1: BUILD TRUST & LEARN THE LANDSCAPE (DAYS 1-30)

PHASE 1: BUILD TRUST & LEARN THE LANDSCAPE (DAYS 1-30)

The first 30 days are critical for setting the tone as a new CAO. In this phase, your focus is on building trust, learning the organizational and community landscape, and laying the groundwork for effective leadership. The following priorities will help you establish credibility, foster key relationships, and avoid common early missteps.

Goal: Build trust, understand the organization and community, and establish your leadership presence.

1 Understanding Your Municipality

- ✓ Analyze demographics, history, and community culture.
- ✓ Review strategic plans, budgets, bylaws, and key municipal documents.
- ✓ Conduct a "listening tour" with department heads and staff.

2 Build Credibility & Relationships

- ✓ Meet one-on-one with the Mayor and each Council member to understand priorities and communication styles.
- ✓ Hold informal sessions (e.g., coffee chats, site visits) with staff to foster trust and reduce the "intimidation factor."
- ✓ Begin stakeholder mapping (Power Wheel) for community partners, Indigenous leaders, and external agencies.

3 Establish Communication Foundations

- ✓ Deliver a welcome message to staff and the community outlining your leadership approach.
- ✓ Initiate transparent communication with media and external stakeholders.
- ✓ Begin shaping CAO-Council communication protocols.
- ✓ Consider sending weekly update reports to Council to promote transparency, flag emerging issues early, and demonstrate momentum in your transition.

4 Personal Leadership Focus

- ✓ Identify and address imposter syndrome early on.
- ✓ Engage a mentor or peer network (e.g., through CAMA).
- ✓ Clarify short-term expectations with the Mayor and Council.

CAO Pro Tip: As a CAO, success depends not only on technical knowledge but also on relationship-building and personal leadership growth.

Early Pitfalls to Avoid in Phase 1:

- Don't make hasty structural changes.
- Avoid micromanaging senior staff.
- Don't neglect external engagement with the community.
- Avoid making premature assessments of individuals' skills or personalities.

CAO Pro Tip: Own Your Onboarding

Don't wait for someone to hand you a roadmap—build your own onboarding plan. Proactively meet with each Council member, department head, and key community partner. Ask about priorities, pain points, and what success looks like. Early relationship-building sets the tone for trust and collaboration.

CREATING A STRONG ONBOARDING PLAN: SETTING YOURSELF UP FOR SUCCESS

Transitioning into the role of CAO is a pivotal leadership step. A well-structured onboarding plan is critical to laying a solid foundation for success. While municipalities may vary in their onboarding approach, every new CAO should take a proactive role in shaping this process.

Key Steps for Building an Effective Onboarding Plan:

1. **Engage with Your Predecessor (if available):** Schedule a knowledge transfer session to gain insights into active projects, unresolved challenges, and political dynamics.
2. **Establish Early Relationships:** Meet with the Mayor, Council members, senior leadership, and key staff. Focus on building rapport and understanding organizational culture and expectations.
3. **Conduct a Comprehensive Document Review:** Move beyond standard orientation to examine core documents, including the municipal budget, strategic plan, financial statements, and key operational policies.
4. **Clarify Governance and Role Expectations:** Collaborate with the Mayor and Council to align on decision-making protocols, governance principles, and your mandate as CAO.
5. **Set Clear, Early Priorities:** Identify achievable short-term goals and develop a structured 30-60-90-day plan to guide your transition.
6. **Leverage Mentorship and Peer Networks:** Connect with CAMA, peer CAOs, and other professional networks for ongoing mentorship and guidance.

An intentional and active onboarding process will help you earn credibility, foster trust, and establish a strong leadership foundation for your tenure as CAO.

Understand and Engage: Your Municipality and Organization

A successful Chief Administrative Officer (CAO) takes time to understand both the community they serve and the organization they lead. Your municipality's identity is deeply rooted in its demographics, history, and culture—and your organization's structure and operations are shaped by those same influences. Gaining a comprehensive understanding of both will help you make informed decisions, build trust, and set a collaborative tone.

Understand the Municipality

- **Demographics:** Review population statistics including age distribution, diversity, income levels, and growth trends. These insights help anticipate service demands, from senior care to youth programming.
- **History:** Familiarize yourself with key milestones, events, and traditions that have shaped the community. Leverage this understanding to show respect for the community's heritage.
- **Culture:** Engage with the local customs, values, and attitudes that shape public perception and service expectations. Attending cultural events and speaking with local leaders can offer invaluable insights.

Listening, Learning and Engaging the Organization

Active listening is one of the most effective ways to build trust and demonstrate respect for the perspectives of others. By listening attentively, you gain valuable insights into the concerns, priorities, and expectations of Council, staff, and the community. Encourage open dialogue by asking open-ended questions that invite deeper understanding. Take notes to capture key themes, which will inform your leadership approach and foster a culture of trust and collaboration.

Engaging directly with department heads, senior leaders, and frontline staff provides critical context about the organization's current realities—what is working well, where challenges exist, and how your leadership can support positive change. Their input will build shared ownership of future improvements.

Reviewing Foundational Documents

To complement your listening efforts, conduct a thorough review of key documents to gain a deeper understanding of your municipality's priorities, financial health, and governance structure. These materials will help you align your early actions and leadership with Council's vision and the organization's operational needs.

Document Type	Key Focus
Strategic Plans	Understand Council's long-term goals and ensure alignment with operations. Look for gaps between stated objectives and current initiatives.
Budgets	Grasp the financial landscape by analyzing operating and capital budgets. Identify underfunded areas and potential efficiencies.
Audits and Financial Statements	Evaluate fiscal health and compliance. Address recurring audit findings and demonstrate financial stewardship.
Policies and Procedures	Ensure operational policies (human resources, procurement, governance) are up to date and aligned with best practices.
Organizational Structure and Bylaws	Clarify governance models, roles, and procedural rules. Familiarize yourself with Council bylaws and decision-making processes.
Capital Plans and Asset Management Reports	Identify infrastructure needs and funding gaps to guide capital investment planning.
Land Use and Development Plans	Align zoning and development trends with Council's strategic vision for economic growth.
Service Delivery Reviews and Performance Reports	Seek opportunities to streamline services and improve efficiency.
Emergency Management and Business Continuity Plans	Confirm risk mitigation strategies and ensure readiness for emergencies.
Intergovernmental Agreements and Shared Services Agreements	Review regional partnerships and evaluate their effectiveness for mutual benefit.

By thoroughly reviewing these key documents, you can gain a deep understanding of your municipality's operational landscape, financial health, and strategic direction. This foundational knowledge will enable you to make informed decisions, align priorities, and support the municipality's long-term success.

While understanding internal operations is critical, building external relationships is equally vital to your role as CAO.

Mapping Key Stakeholders & Building External Relationships

As a CAO, your leadership extends beyond municipal operations to the broader community and external partners. Understanding who your key stakeholders are—and building strong relationships with them—lays the groundwork for collaborative success, political acumen, and effective service delivery.

Building Your Public Profile as CAO

Your public presence as CAO matters. It shapes how the community perceives your leadership and influences stakeholder trust. Early in your role, consider:

- **Issuing a Public Welcome Message:** Share a statement via the municipal website, local media, or social media platforms to introduce yourself and your leadership philosophy to residents.
- **Establishing Relationships with Local Media:** Proactively reach out to editors, reporters, or media relations contacts to set a tone of transparency and collaboration.
- **Framing a Positive Leadership Brand:** Position yourself as approachable, knowledgeable, and committed to both Council's vision and the community's well-being.

While visibility is important, ensure your public role supports—not overshadows—Council. In media interviews, photo opportunities, and public appearances, defer to elected officials as the community's primary spokespeople, and focus on reinforcing their decisions with professional context and operational insight.

A CAO who actively engages the community and external partners early on helps strengthen the municipality's reputation and builds crucial bridges for long-term success.

Create a Stakeholder "Power Wheel"

An essential first step in strengthening your leadership approach as a CAO is to develop a Stakeholder **"Power Wheel"**. This tool, advocated by the Harvard Kennedy School of Government, serves as a visual map of key external stakeholders, helping you identify where influence, collaboration, and potential challenges lie beyond City Hall. By understanding your inner and outer circles of influence—ranging from Mayor and Council to community leaders, business partners, and regional agencies—you can better anticipate external pressures, navigate relationships, and create strategic alliances. The Power Wheel supports you in actively engaging these stakeholders early on, fostering trust, transparency, and resilience in your municipal leadership.

For a deeper dive into how to build and apply the Power Wheel—including stakeholder categories, guiding principles of Partnership, Openness, Willingness, Ethics, and Reliability, and practical engagement strategies—please refer to the detailed section in **Appendix G**.

The Power Wheel empowers CAOs to navigate resistance and step outside their comfort zones when tackling controversial issues for the greater good. By building a network of allies and confidants, CAOs can mitigate risks and enhance their ability to lead effectively, even in challenging circumstances.

Incorporating the Power Wheel into your leadership approach will enable you to build trust, demonstrate ethical leadership, and cultivate strong, collaborative relationships. This proactive framework is not just a strategy—it's a cornerstone of effective leadership that will support you throughout your tenure as a CAO.

This diagram is illustrative only–specific roles, relationships, and reporting structures may vary significantly depending on your jurisdiction, organizational structure, and local governance context. Use this model as a starting point and adapt it to reflect your municipality's unique environment.

CAO PowerWheel

Your Leadership Advantage: The Right Questions to Ask Toolkit

The "**Effective CAOs: The Right Questions to Ask Toolkit**" is your early leadership ally—designed to spark meaningful conversations, foster transparency, and help you build trust from day one. For first-time Chief Administrative Officers (CAOs), the ability to ask the right questions is essential for building strong relationships with Council, staff, and key stakeholders. By encouraging thoughtful dialogue, this Toolkit supports informed decision-making and positions you to lead with confidence.

This resource provides carefully curated questions to engage your senior management team, department heads, and Council members. It helps you gather valuable insights, address concerns, and ensure your leadership strategies align with the municipality's operational needs. In doing so, you demonstrate transparency, accountability, and collaboration—essential pillars of municipal leadership.

The Toolkit offers a practical framework to help identify organizational strengths, challenges, and opportunities. It includes relationship-building guidance tailored to Council orientation, departmental meetings, and leadership team discussions, while encouraging both operational and personal engagement with your team. Additionally, the Toolkit includes checklists, examples, and prompts to help you prepare for complex leadership challenges and smooth your transition into the CAO role.

To use the Toolkit effectively, begin by engaging Council to clarify expectations and their strategic focus. Then, apply the questions in meetings with departments to assess operations and challenges. Finally, use the insights gathered to shape a leadership strategy that aligns operations with your municipality's long-term vision.

This Toolkit equips new CAOs with the tools and insights to navigate early leadership stages and build a solid foundation for municipal success.

Building a Strong Relationship with your Executive Assistant – A Key Ally in Leadership Transitions

Your Executive Assistant (EA) can be one of your most valuable allies during your first 100 days as CAO, particularly if you are new to the organization or community. EAs often possess deep institutional knowledge, historical context, and awareness of organizational dynamics that can help you navigate early challenges, understand workplace culture, and anticipate key issues.

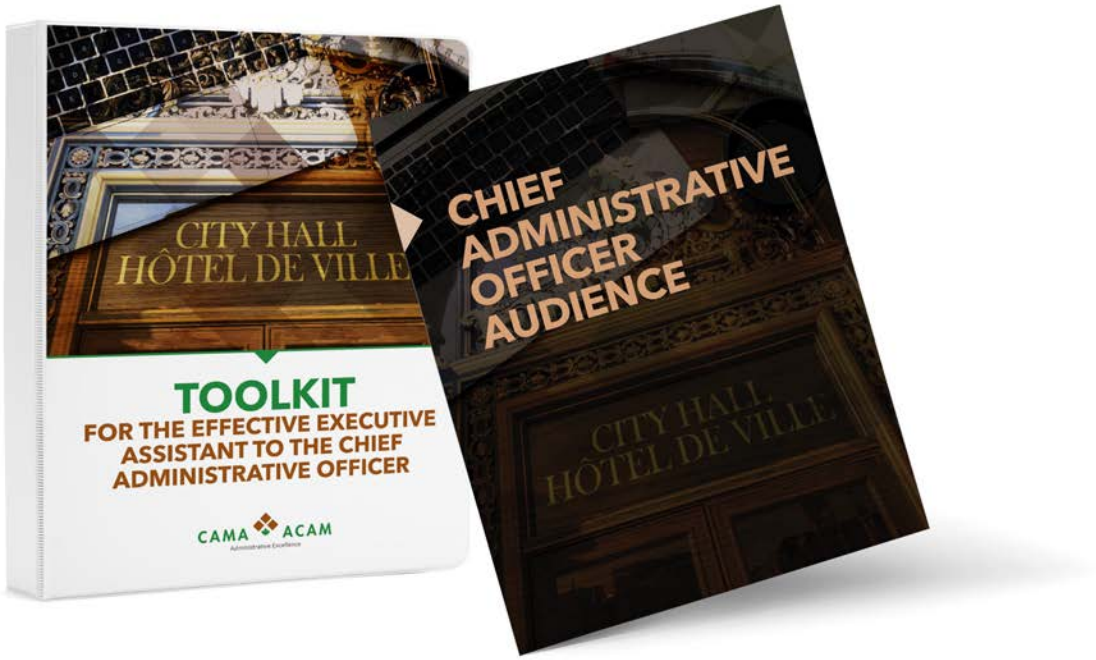
Establishing a strong, collaborative relationship from day one is critical. Treat your EA as a trusted partner who contributes strategically to your success. Early actions should include scheduling a one-on-one onboarding session with your EA to clarify communication styles, priorities, and mutual expectations. Encourage your EA to share insights about Council preferences, staff dynamics, and procedural norms—information that will be crucial in shaping your leadership approach.

Within your first weeks:

- Hold daily or regular check-ins to ensure alignment and build trust.
- Involve your EA in high-level discussions, allowing them to anticipate your needs and contribute strategically.
- Empower them with autonomy for managing your schedule, correspondence, and internal workflows, freeing you to focus on relationship-building and big-picture leadership.

A productive CAO-EA partnership will boost your efficiency, improve internal communications, and help foster a positive, well-organized office culture.

For more in-depth guidance on building and sustaining an effective CAO-EA relationship—including onboarding strategies, delegation tips, and professional development practices—refer to the **CAO Chapter of the CAMA Toolkit for the Effective Executive Assistant to the Chief Administrative Officer**.



MANAGING RELATIONSHIPS & BUILDING TRUST

Strong relationships with elected officials and staff are vital to a CAO's success. These connections foster trust, collaboration, and a shared purpose, helping the municipality achieve its goals.

Fostering Trust and Learning from Your Team

To gain trust, engage your team early. Meet employees at all levels to learn their roles, challenges, and perspectives. Listen more than you speak to absorb institutional knowledge. Empower your leadership team by delegating effectively and recognizing their expertise. Trust fosters a culture of accountability and shared success.

Celebrate achievements to build morale. Acknowledge staff contributions by thanking them personally through cards, memos, or formal recognition programs. When staff feel valued, they are more motivated and committed.

Communicating Transparently

Transparent communication is the cornerstone of effective leadership. As a CAO, ensure that Council, staff, and the public are well-informed about priorities, decisions, and progress. Develop clear internal and external communication protocols to foster trust and reduce uncertainty. Whether through regular updates to Council, town halls with staff, or media briefings for the community, consistent and open communication demonstrates accountability and builds confidence in your leadership. Avoid surprises—share both challenges and successes openly to foster a collaborative and resilient municipal culture.

Introducing Yourself to Your Team

Make a strong first impression. Share your background, leadership philosophy, and vision through multiple channels—Council meetings, staff messages, and one-on-one introductions with key personnel. Early engagement builds rapport and open communication.

Leading Former Peers: Transitioning from Colleague to CAO

If you have been promoted from within, you will face unique challenges in leading former peers. While some may support your transition, others may struggle with the shift in dynamics. Successfully navigating this change requires confidence, fairness, and professionalism.

Leading former peers presents several challenges that require a thoughtful and balanced approach. First, there is the challenge of changing expectations. Colleagues who once viewed you as an equal must now adjust to recognizing your leadership authority, which can create discomfort or uncertainty. In some cases, you may also encounter skepticism or resentment, as certain individuals might question your ability to lead or feel disappointed if they had their own aspirations for the CAO role.

Maintaining professional boundaries is another key hurdle. While you may have existing friendships or informal dynamics with some staff members, these relationships may need to evolve to preserve fairness and credibility in your new leadership position. Finally, you must strike a delicate balance between continuity and change—respecting the organization's history and culture while also implementing improvements that will move the municipality forward.

Key Strategies for Success

Leadership Strategy	Key Actions
Establish Authority Without Arrogance	• Be open about the transition and acknowledge the shift in roles while emphasizing that your focus is on moving the organization forward. • Demonstrate leadership through your actions—strategic decision-making, problem-solving, and vision—rather than relying on hierarchy or title. • Avoid favoritism, as past friendships influencing professional decisions can quickly erode your credibility.
Communicate Openly and Set Expectations	• Hold an early leadership team meeting to outline your priorities, expectations, leadership approach and clarify roles and reporting structures. • Acknowledge your team's expertise and encourage input.
Set Boundaries While Remaining Approachable	• Adjust social interactions with former peers to maintain professional integrity while still fostering team morale. Be mindful of how past friendships may be perceived in decision-making. • Keep an open-door policy and encourage staff to bring forward ideas, concerns, and solutions.
Address Resistance Professionally	• Handle skepticism through one-on-one conversations. • Let your actions—fairness, consistency, and sound decision-making—build confidence over time.
Adopt an Organization-Wide Mindset	• As CAO, you must transition from thinking like a department head to overseeing the entire organization. • Resist the urge to micromanage—trust department heads to lead within their areas while you focus on strategic leadership. • Balance your relationships between staff and Council, ensuring you serve as a bridge between governance and administration.
Build Trust Through Early Wins	• Look for small but impactful improvements. • Ensure continuity and follow through on commitments to instill confidence.

Your internal knowledge and a thoughtful approach will help you transition smoothly. By fostering trust, setting expectations, and balancing relationships, you'll establish yourself as a respected and effective leader.

CAO Pro Tip: Remember: Leadership isn't about changing everything overnight. It's about guiding the organization forward while maintaining relationships, credibility, and stability.

OVERCOMING IMPOSTER SYNDROME

Stepping into the Chief Administrative Officer (CAO) role can be both exciting and daunting—especially if you are following a long-tenured predecessor. It's natural to experience imposter syndrome—self-doubt or the fear of being "not good enough" despite your qualifications. This is common for first-time CAOs, particularly those transitioning from senior leadership roles.

The good news? You are not alone. Many CAOs have faced these feelings and successfully navigated them. This section offers practical strategies to build confidence, establish credibility, and embrace your leadership journey.

Recognizing Imposter Syndrome

Imposter syndrome can manifest as:

- Feeling unqualified despite your experience.
- Comparing yourself to your predecessor and doubting your ability to measure up.
- Avoiding big decisions for fear of mistakes.
- Downplaying accomplishments or struggling to accept recognition.
- Feeling like you must work twice as hard to prove yourself.

These thoughts are not a true reflection of your abilities. Recognizing them early is key to overcoming them.

Reframing Your Mindset: You Deserve to Be Here

Shift your focus from self-doubt to your strengths and unique contributions:

- Every CAO starts somewhere – what you may lack is familiarity, you make up for in curiosity and commitment.
- **Fresh Perspective**: Every CAO has a first day—new ideas and adaptability are just as valuable as experience.
- **Unique Skill Set**: Whether from local government, the private sector, or another field, your skills earned you this role.
- **Growth Matters**: Nobody knows everything on day one. Successful CAOs never stop learning.
- Remember—Council chose you for a reason. Trust their decision.

Building Confidence Through Action

Confidence is built through small wins and deliberate action:

- **Seek Early Wins**: Engage with staff, refine a process, or address an immediate challenge to demonstrate leadership.
- **Ask Questions**: You're not expected to know everything—asking thoughtful questions shows engagement and commitment.
- **Track Successes**: Keep a record of accomplishments—big or small—as a reminder of your growth and impact.
- Acknowledge progress even during stressful or uncertain weeks. Doing the best you can while adjusting is still leadership.

Earning Credibility and Trust

Credibility isn't about proving you're the smartest—it's about building trust:

- **Listen Before You Lead**: Take time to understand staff, Council, and community perspectives before making changes.
- **Develop Key Relationships**: Prioritize strong connections with your Mayor, Council, senior leadership team, and front-line employees.
- **Communicate with Transparency**: Be honest about what you know and what you're learning—this builds confidence in your leadership.

Leveraging Your Support System

No CAO succeeds alone. Seek guidance from trusted networks:

- **Find a Mentor**: An experienced CAO can offer advice and share insights.
- **Engage with Professional Networks**: Organizations like CAMA and Provincial/Territorial Associations provide valuable connections and resources.
- **Consider Executive Coaching**: A coach can refine your leadership style and boost confidence.
- **Develop a Peer Network**: Connect with other first-time CAOs who understand the transition process.

Reframing Challenges as Opportunities

- **Adopt a Learning Mindset**: The best leaders are always growing.
- **Own Mistakes & Learn from Them**: Every leader makes mistakes—what matters is how you respond.
- **Celebrate Progress**: Leadership is a journey. Every step forward is success.

Final Thought: You Belong Here

Becoming a CAO is a process, not an overnight transformation. With time, experience, and the right mindset, you will grow into the role and make it your own. Don't expect perfection – expect learning. Instead of comparing yourself to those before you, focus on the impact you're making today.

CAO Pro Tip: The greatest leaders aren't those with all the answers, but those with the courage to lead despite uncertainty.

A First-Time CAO's Story: Learning to Lead with Confidence

When a new CAO was appointed to a small but growing municipality, he felt an immediate wave of doubt. Unlike his predecessor, who had thirty years of experience in local government, Ted came from the private sector, with a background in organizational leadership but no direct municipal experience.

His first day in the office was overwhelming. Walking into Council Chambers, he saw faces filled with expectation. Staff members approached him with operational concerns, community leaders wanted to discuss ongoing projects, and his email inbox was already flooded with inquiries. **"What have I gotten myself into?"** he thought.

Taking the First Steps

Instead of allowing his imposter syndrome to take over, Ted took a few key steps:

- **He Listened First:** Rather than rushing to prove himself, he set up one-on-one meetings with key staff, Council members, and Department Heads. He asked about their challenges, their successes, and their expectations for the future.
- **He Found a Mentor:** He reached out to a seasoned CAO in another municipality who had been through a similar transition. Having someone to call for advice made a significant difference in boosting his confidence.
- **He Focused on Early Wins:** Instead of trying to overhaul processes immediately, he identified small but impactful improvements, such as streamlining Council reporting and improving staff communication.
- **He Leaned on Professional Networks:** Attending CAMA workshops and networking with other first-time CAOs gave him valuable insights and reassurance that his struggles were normal.

Lessons Learned

As months passed, he realized that his initial fears were slowly being replaced with confidence. He learned that:

- **You don't need to have all the answers on day one**. Leadership is about learning and making informed decisions over time.
- **Relationships matter more than expertise.** By fostering trust with his team and Council, he gained credibility even without decades of experience.
- **Mistakes are part of the process.** He embraced challenges as learning opportunities rather than failures.
- **Growth takes time.** Confidence doesn't come from knowing everything—it comes from taking action despite uncertainty.

Now, a year into the role, he looks back at his first day and smiles. He no longer feels like an imposter. Instead, he understands that leadership is not about how much you know when you start, but about your willingness to learn, adapt, and lead with integrity.

TOP 10 STRATEGIES FOR LEADING WITH CONFIDENCE AND CLARITY

"Pace Yourself, Stay Engaged, and Lead with Awareness."

1. **Prioritize Your Well-Being.** Model resilience by making time for rest, reflection, and self-care, ensuring you can lead with energy and clarity.
2. **Take Time for Thoughtful Decisions.** Make informed choices by first understanding the organization's priorities, dynamics, and culture before implementing significant changes.
3. **Align with Council's Vision.** Demonstrate leadership by supporting and advancing Council's strategic goals from the outset, building trust and cohesion.
4. **Set Realistic Expectations.** Set realistic goals and timelines to avoid unmet expectations that could damage your credibility.
5. **Engage and Collaborate.** Strengthen relationships and organizational trust by involving staff, Council, and stakeholders early and often.
6. **Communicate Consistently and Transparently.** Keep lines of communication open to build trust, demonstrate accountability, and ensure everyone feels informed and included.
7. **Empower Your Team.** Focus on strategic leadership by delegating operational responsibilities to your senior leadership team and trusting their expertise.
8. **Respect and Understand Organizational Culture.** Approach changes with empathy and awareness by taking time to learn the existing culture and building on what works.
9. **Address Challenges Proactively.** Foster a healthy workplace by engaging in timely, respectful conversations to resolve issues before they escalate.
10. **Stay Open to Feedback.** Embrace constructive input as a valuable tool for growth, learning, and strengthening your leadership approach.

By focusing on stakeholder analysis and trust-building, while avoiding common pitfalls, your first 100 days can establish a strong foundation for long-term success as a CAO.

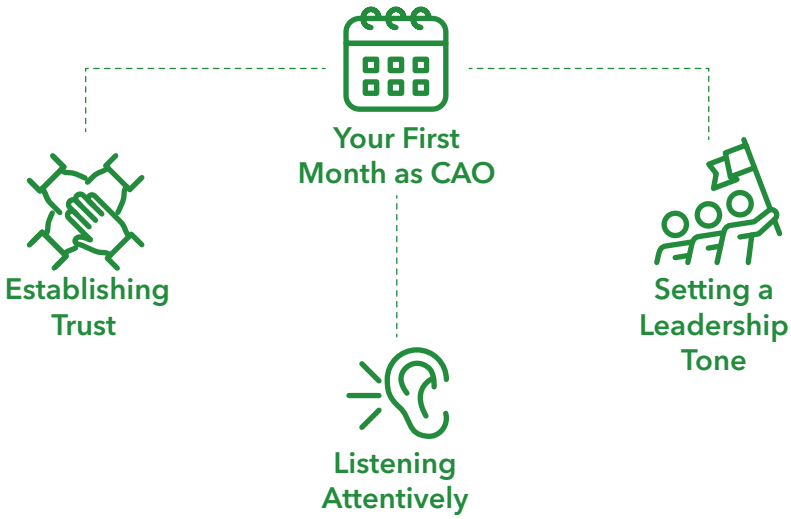
Reflection Questions

As you complete Phase 1, it's important to pause and reflect on how your early actions are shaping your leadership journey. The following questions are designed to help you assess your progress, identify areas for growth, and set your intentions for the next phase of your transition.

1. Where do you feel most confident, and where might you benefit from peer or mentor support?
2. Who can you rely on as a sounding board when you encounter difficult decisions or uncertainties?
3. What lessons from your past leadership roles do you want to consciously bring forward—and which habits might you want to adjust?
4. How will you personally model the kind of leadership culture you want to cultivate within your municipality?
5. What are three relationships you want to prioritize building trust within your first month?
6. What will success look like in your relationship with Council by the end of your first 100 days?
7. How will you ensure staff at all levels feel heard and valued during your transition?
8. How will you model adaptability and openness to feedback during your first 100 days?
9. What will you do to foster a safe space for your team to voice concerns or new ideas?
10. What key early actions will help you demonstrate respect for the municipality's history and culture?
11. How will you balance honoring existing organizational practices with identifying areas for innovation?

Your First 30 Days: Laying the Groundwork

Your first month as CAO is about establishing trust, listening attentively, and setting a leadership tone that emphasizes transparency and collaboration. By engaging with Council, staff, and key stakeholders, you begin shaping a positive and forward-focused organizational culture. These early actions will serve as the foundation for your credibility and long-term effectiveness.



Looking Ahead: Building on Your First 30 Days

With the groundwork in place, the next phase is about moving from observation to action. Your focus will shift to strengthening relationships, aligning your leadership with Council's strategic vision, and initiating your early priorities.

In Phase 2, you will:

- Enhance your influence by refining communication and governance practices with Council.
- Translate insights from your listening tour and document reviews into targeted operational improvements.
- Lead your senior management team in advancing shared organizational goals while deepening trust and collaboration.

With this foundation, you will confidently move from listening and learning to leading and implementing change—guiding your organization toward sustainable success.

PHASE 1 CHECKLIST: YOUR FIRST 30 DAYS AS A CAO

Understand Your Municipality

- ☐ Review community demographics: population trends, diversity, income, and age distribution.
- ☐ Learn the municipality's history and cultural values to guide respectful and informed decision-making.
- ☐ Attend community events and meet local leaders.

Review Foundational Documents

- ☐ Strategic Plan & Budget
- ☐ Financial Statements & Audit Reports
- ☐ Key Policies & Procedures (HR, procurement, governance)
- ☐ Organizational Structure & Bylaws
- ☐ Capital & Asset Management Plans
- ☐ Land Use & Development Plans
- ☐ Service Delivery Reviews
- ☐ Emergency Management Plans
- ☐ Intergovernmental & Shared Services Agreements

Strengthen Council & Staff Relationships

- ☐ Schedule one-on-one meetings with the Mayor and Council members.
- ☐ Meet senior leadership and department heads.
- ☐ Clarify roles, expectations, and communication preferences.
- ☐ Collaborate with your Executive Assistant for seamless operations.

Establish External Relationships

- ☐ Map key stakeholders using a Stakeholder Power Wheel (e.g., community groups, regional partners, economic players).
- ☐ Initiate introductory meetings with major partners (e.g., First Nations, business leaders, provincial agencies).
- ☐ Engage at community or regional events.
- ☐ Begin reviewing external agreements and shared service partnerships.

Build Your Public Profile

- ☐ Craft a public welcome message for staff, Council, and residents.
- ☐ Engage local media early and build relationships with reporters/editors.
- ☐ Attend public events to demonstrate leadership visibility and community connection.

Listen & Learn

- ☐ Practice active listening—ask open-ended questions and take notes during meetings.
- ☐ Begin identifying strengths, challenges, and cultural nuances across departments.
- ☐ Leverage CAMA's "Right Questions to Ask" Toolkit during staff and Council discussions.

With foundational trust established and a deeper understanding of your organization's landscape, you are now ready to move from listening and learning into leading with intention. Phase 2 is where you will begin to shape alignment with Council and staff, translate observations into early action, and start building momentum.

Staying Internally Driven as a CAO

As a CAO, your leadership must be grounded in a strong internal drive and personal commitment to excellence. In municipal government, recognition and praise may not always come easily. There will be times when your efforts to navigate complex issues, implement solutions, or foster organizational success go unacknowledged, or when achievements are attributed to Council or others.

This is a natural part of working in a political environment, where elected officials are often the public face of municipal accomplishments. While collaborative wins are the goal, you must be prepared to take pride in the positive impact of your work, regardless of external validation.

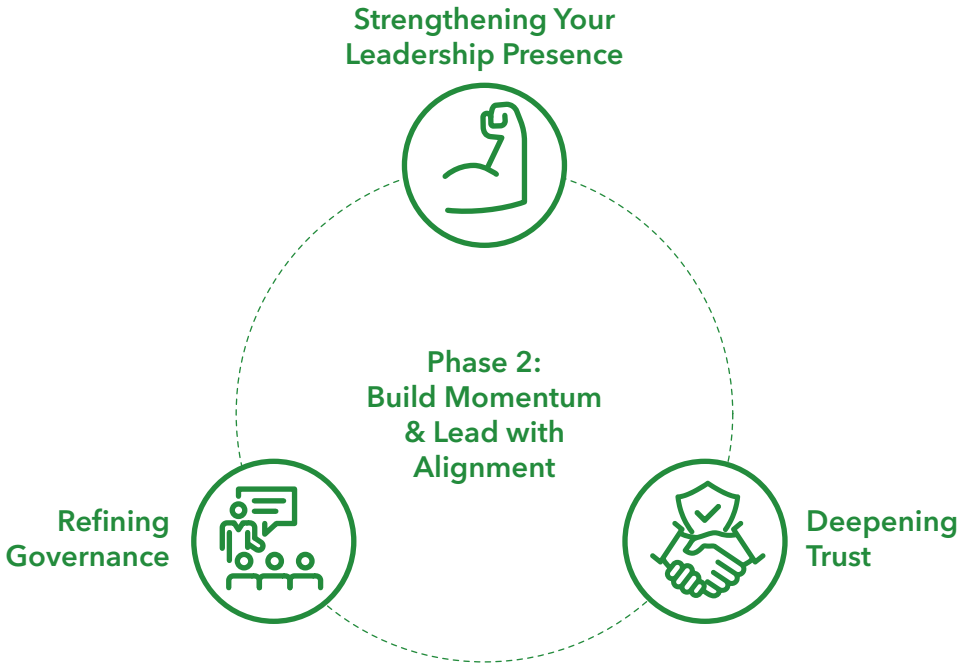
Effective CAOs focus on the success of the organization and the well-being of the community, knowing that their leadership behind the scenes is critical—even if it's not always visible or publicly recognized. The ability to remain steady, professional, and self-motivated is one of the most important qualities you will carry into this role.

CAO Pro Tip: Lead for the long game. Your influence is often most powerful when it quietly drives results, strengthens the organization, and leaves a legacy of effective governance and public service.

PHASE 2: BUILD MOMENTUM & LEAD WITH ALIGNMENT (DAYS 31-60)

PHASE 2: BUILD MOMENTUM & LEAD WITH ALIGNMENT (DAYS 31-60)

With your initial assessment and relationship-building underway from Phase 1, it's time to shift gears. Phase 2 focuses on accelerating momentum by deepening trust, refining governance, and strengthening your leadership presence. In this next phase, you move from learning and observing to actively aligning people, processes, and priorities. This is where you begin translating insight into action—setting the tone for your leadership style and laying the groundwork for sustained organizational success.



Phase 2: Build Momentum & Lead With Alignment (Days 31-60)

Goal: Strengthen governance, assess culture, and position yourself as a collaborative leader.

1 Evaluate Organizational Culture

- ✓ Assess team morale, staffing capacity, and workplace culture through surveys and informal discussions.
- ✓ Identify blind spots and engage front-line staff to get unfiltered feedback.

2 Refine Governance & Council Relations

- ✓ Review and clarify governance roles vs. administration (CAO-Council Covenant).
- ✓ Implement early governance workshops or orientation sessions for Council using the CAMA Orientation Toolkit.
- ✓ Support the Mayor's leadership role in meetings and conflict management.

3 Strengthen, Internal, External & Community Relationships

- ✓ Communicate with staff to continue to develop trust and credibility
- ✓ Expand your Power Wheel by engaging community organizations, regional partners, and government agencies.
- ✓ Develop a simple external communications plan to enhance transparency and visibility including the media.

4 Team Leadership Development:

- ✓ Empower your leadership team with increased involvement in Council meetings and strategic discussions.
- ✓ Begin reviewing succession plans and leadership gaps.
- ✓ Ask your direct reports how you can help them be successful – and how they, in turn, support their teams' success.

5 Personal Leadership Focus:

- ✓ Start building your "early wins" portfolio—resolve small but visible issues that matter to staff or Council.
- ✓ Begin leading by example in communication, recognition, and decision-making.

Pitfalls to Avoid in Phase 2:

- Avoid neglecting external partnerships or public visibility.
- Don't avoid difficult conversations or internal tensions—address them proactively.
- Don't assume momentum will sustain itself – keep reinforcing early wins and alignment.

Understanding the true dynamics of your organization is the key to unlocking its potential. Before driving change or setting new expectations, you must first grasp how your team operates today—from morale to workplace culture to the informal currents that shape decision-making. This section will help you gain critical insights by engaging your people and tuning into your municipality's unique culture.

STRENGTHENING ORGANIZATIONAL CULTURE & YOUR LEADERSHIP PRESENCE

Every municipality has a unique organizational culture shaped by its history, values, and people. As a CAO, understanding and aligning with this culture is critical for driving change and achieving success. This begins with careful observation and active listening. By paying close attention to how the organization operates and engaging with staff at all levels, you can gain valuable insights into the informal networks, relationships, and power dynamics that influence decision-making. It is also important to assess staff morale and engagement through surveys, meetings, or informal conversations to identify areas for improvement. Additionally, understanding the organization's norms and traditions—such as how decisions are made, conflicts are resolved, and successes are celebrated—provides a deeper appreciation of its values and unwritten rules.

Respecting and aligning with the organization's culture helps build trust and facilitates change. Recognizing the strengths that already exist within the organization and building upon them can foster goodwill and credibility. At the same time, adapting your leadership style to align with the culture—while maintaining authenticity and professional integrity—ensures a smoother transition. Clear and consistent communication is essential in articulating how your leadership will enhance the organization's strengths and address its challenges.

CAO Pro Tip: Visibility isn't just about being seen—it's about being real. Show up for your team in ways that are authentic, meaningful, and aligned with your values. That's how you build trust and reinforce a strong organizational culture—not just presence, but purpose.

In some cases, cultural change may be necessary to achieve long-term goals. This requires identifying gaps between the current culture and the desired state and determining areas that need transformation. Engaging senior leadership and Council in discussions about the necessity and direction of cultural change ensures alignment and collective ownership of the process. A CAO who adapts to organizational culture while leading with authenticity will foster trust and position the municipality for success.

CAO Pro Tip: Frontline staff are the eyes and ears of your organization—they often have the clearest insights into day-to-day challenges and successes. Taking time to meet them, listen to their feedback, and show genuine interest in their perspectives not only uncovers valuable information but also builds trust and boosts morale. Staff appreciate when leadership takes the time to engage directly—it sends a clear message that you care about their work and well-being. A simple conversation can go a long way in strengthening your connection with the people who keep the municipality running smoothly.

When conducting your cultural assessment, it is important to consider equity, diversity, and inclusion (EDI) as a key factor. Begin by reviewing your municipality's diversity and inclusion policies, along with workforce demographics, to understand the current landscape. If your municipality has an Human Resources department, collaborate with them to identify existing EDI initiatives and any gaps that may need attention. Reflect on how your leadership style can help foster inclusive hiring practices, employee engagement, and equitable decision-making processes. In smaller municipalities, where resources may be limited, it is especially important to ensure that all staff and community voices are heard—including those from underrepresented groups—by adopting grassroots engagement approaches that promote inclusion and representation.

CAO Pro Tip: Demonstrate reliability by being punctual for meetings and responding to calls or messages in a timely manner. Small actions speak volumes about your leadership style and respect for others' time.

Addressing the Intimidation Factor as a CAO

Becoming a CAO comes with authority and responsibility, but it also comes with a sometimes-overlooked challenge—the intimidation factor. Whether you intend to or not, your position alone can create anxiety among staff, especially those who have limited direct interaction with you. A simple request to "stop by your office" without context can send someone into a spiral of worry, assuming the worst.

Consider this scenario: A CAO casually tells a staff member at the end of the day, "Can you come by my office tomorrow morning?" but provides no explanation. The staff member spends the night wondering, "What did I do wrong?" only to learn the next day that it was a simple ask about a minor procedural change. These small moments can shape how approachable—or intimidating—you are perceived to be.

Here are some practical ways to reduce unintended intimidation and foster a more positive, approachable leadership presence:

1 Be Mindful of How You Call People to Your Office

- If you need to meet with a staff member, provide context whenever possible. Instead of saying, *"Stop by my office tomorrow," say, "I'd like to get your thoughts on [specific topic]. Can you stop by my office when you have time?"*
- If it's a positive conversation (e.g., recognition or brainstorming), let them know in advance to prevent unnecessary stress.

2 Build Casual Rapport Outside of Meetings

- Make a habit of walking around the office and having informal check-ins with staff where they work. A visible and engaged CAO is less intimidating than one who only interacts in formal settings.
- Join staff for casual conversations in shared spaces like the break room but keep it natural—nobody wants to feel like their boss is monitoring their coffee break.

3 Use Clear and Encouraging Communication

- Ensure that your emails and verbal requests are clear in tone. A short, "We need to talk," can cause unnecessary anxiety. A small tweak like, *"Let's connect about X—I'd love to hear your thoughts,"* creates a more open and welcoming tone.
- Recognize that many staff members may be hesitant to bring concerns forward. Encouraging a culture of open dialogue will help break down barriers.

4 Create a Culture Where Meetings Aren't Always Negative

- If the only time staff hear from you directly is for major problems, they will naturally associate your presence with bad news. Make time for positive feedback, project updates, and recognition of their contributions.
- Have occasional open-door sessions where staff can drop in with questions or ideas in a less formal setting.

5 Acknowledge Power Dynamics and Address Them Proactively

- Understand that your title alone can be intimidating, particularly to new employees or junior staff. A simple, *"I know that sometimes it can feel intimidating to come to the CAO's office, but I truly want to hear from you,"* can go a long way in easing that perception.
- If you're noticing that staff hesitate to speak up in meetings, try to actively invite input and reassure them that their perspectives are valued.

Your leadership presence sets the tone for the organization. A CAO who is approachable, clear in communication, and intentional about breaking down unnecessary intimidation fosters a culture where staff feel comfortable engaging, sharing ideas, and bringing their best work forward. Your role isn't just about leading—it's about creating an environment where others can thrive.

REFINE GOVERNANCE & COUNCIL DYNAMICS

Once you have a strong sense of internal culture and frontline realities, it's time to look outward—to Council. A CAO's relationship with Council is foundational to organizational success. Early efforts to clarify roles, establish governance protocols, and align on communication can prevent friction and create an environment where leadership and governance reinforce each other, not compete.

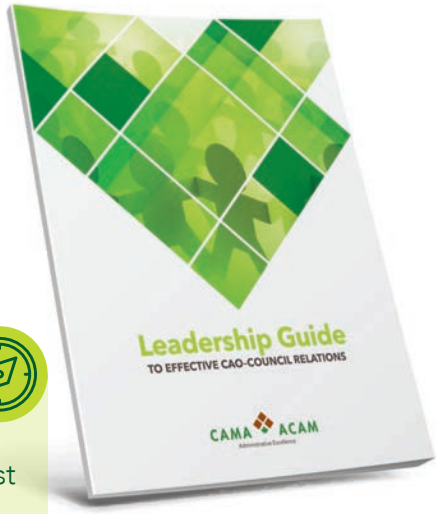
CAO Pro Tip: Be aware of Council dynamics—understand if there are factions, new members, or veteran Councillors with significant influence.

Governance vs. Management: Clarifying Roles and Establishing a CAO-Council Protocol

Effective municipal leadership depends on a clear distinction between governance and management. Council is responsible for setting strategic direction and approving policy, while the CAO implements Council's decisions and manages day-to-day operations. Without defined boundaries, confusion, inefficiencies, and potential overreach can arise.

To ensure alignment and avoid misunderstandings, municipalities should adopt a formal CAO-Council Covenant. This protocol outlines roles, communication practices, and decision-making authority, providing structure and fostering collaboration. Key elements include:

- **Role clarity:** Council governs; the CAO manages operations.
- **Communication protocols:** Regular briefings and updates ensure transparency and prevent micromanagement.
- **Decision-making framework:** Clear guidelines on what decisions require Council approval versus CAO delegation.
- **Council inquiries:** All information requests should flow through the CAO to ensure consistency and alignment.
- **Performance evaluation:** A formal review process supports CAO accountability and effectiveness.
- **Conflict resolution:** A process for addressing disputes maintains professionalism and stability.



Ongoing governance education for Council and a culture of mutual respect further strengthens this relationship. By setting clear expectations and maintaining open communication, Council and the CAO can work together effectively, advancing municipal priorities and reinforcing public trust.

A sample CAO-Council Covenant can be found in **CAMA's Leadership Guide to Effective CAO-Council Relations**

CAO Pro Tip: When presenting a CAO/Council Covenant to Council, frame recommendations in terms of "How this will help Council achieve its strategic priorities." Councils respond best when they see how proposals link directly to their goals.

Speaking Truth to Power

Delivering honest, sometimes difficult feedback to Council is a fundamental responsibility of a CAO. It requires a balance of integrity, professionalism, and strategic communication. While Council members may not always want to hear tough truths, objective, well-supported advice is essential for sound decision-making and preserving the CAO's credibility.

Preparation is key when addressing difficult topics. Ensure your feedback is backed by accurate data, clear analysis, and well-considered potential solutions. Anticipate questions or pushback and be ready to explain the rationale behind your recommendations. Framing feedback positively can make it more palatable—rather than focusing solely on problems, highlight opportunities for improvement and pathways to achieve better outcomes. This approach fosters collaboration and reduces defensiveness.

Maintaining professionalism in all interactions is crucial, particularly when facing resistance. Present your case with confidence, using clear, neutral language that avoids personalizing issues. If tensions rise, remain calm and focused on the facts, reinforcing your role as an objective advisor. Recognizing Council's authority while ensuring that your expertise is valued is a delicate but necessary balance.

A CAO who consistently provides honest, solutions-oriented advice earns long-term respect and credibility. By speaking truth to power with integrity, preparedness, and professionalism, you reinforce your role as a trusted municipal leader, ensuring that governance remains effective and informed.

CAO Pro Tip: Be a bridge, not a buffer—while protecting your staff from political interference, also ensure that Council feels supported and informed. Balanced leadership earns trust on both sides.

Managing Conflicts Between Council Members

Conflict among Council members is inevitable, but if left unchecked, it can hinder effective governance and decision-making. As a CAO, your role is to maintain professionalism, ensure adherence to governance processes, and support productive discussions while remaining neutral. Below are practical strategies for navigating Council conflicts, including divided Councils and the unique challenges posed by rogue Council members.

- **Encourage Professional Conduct and Adherence to Governance Norms**

  The CAO should reinforce Council's Code of Conduct and ensure that all elected officials understand their responsibilities in maintaining professionalism. Regular governance training and orientation sessions can help prevent conflicts by reinforcing expectations for respectful debate and decision-making.

- **Maintain Neutrality and Uphold Fair Process**

  Remaining impartial is critical to maintaining credibility. The CAO should not take sides in Council disputes but instead focus on facilitating productive discussions. Encourage structured debates that keep conversations policy-focused and prevent personal attacks.

- **Use Proactive Conflict Resolution Strategies**

  When tensions rise, the CAO can recommend a break in proceedings or a private caucus to allow for de-escalation. If conflicts persist, suggest engaging a third-party mediator to facilitate discussions. Mediation can help shift focus from personal grievances to collaborative problem-solving.

- **Support the Mayor's Role in Conflict Management**

  The Mayor plays a key role in maintaining decorum during Council meetings. The CAO should provide the Mayor with background information, procedural guidance, and suggested approaches for addressing conflict among Council members. Remain neutral – your role is to support the Mayor procedurally, not politically. When the Mayor is involved in disputes, the CAO can encourage mediation and emphasize the importance of leading by example.

- **Prevent Staff Involvement in Council Disputes**

  Council conflicts should remain a political matter, and staff should not be drawn into disputes. The CAO must ensure that staff are shielded from political infighting and that they continue to operate professionally without fear of being used as leverage in Council conflicts.

- **Document Incidents and Provide Recommendations**

  Keeping records of conflicts, including the nature of the dispute and actions taken, ensures transparency and accountability. Documentation can also help identify patterns of recurring issues and inform future conflict resolution strategies.

- **Encourage Council Retreats and Self-Evaluations**

  Regular Council retreats and facilitated self-evaluations help foster teamwork and encourage open discussions about improving Council dynamics. Investing in these preventative measures can help reduce long-term governance dysfunction.

By reinforcing governance protocols, facilitating conflict resolution, and maintaining neutrality, the CAO can help Council navigate disagreements professionally while ensuring municipal operations remain effective.

CAO Pro Tip: Establish clear boundaries to protect staff from political dynamics. Reinforce that staff serve the organization—not individual Council members—and ensure they are never placed in the middle of political disputes. Your leadership sets the tone for a respectful, neutral, and professional workplace.

Managing a Divided Council

A divided Council can create inefficiencies and make it difficult to move forward on key municipal initiatives. The CAO must focus on maintaining structure, enforcing procedural fairness, and fostering collaboration while ensuring that governance remains effective.

- **Maintain Neutrality:** The CAO must remain impartial, ensuring that they serve the entire Council rather than aligning with one faction. This helps avoid any perception of favoritism or bias.
- **Reinforce the Code of Conduct:** Regularly remind Council members of their commitment to respectful and professional interactions, referencing the municipality's Code of Conduct as a guiding document.
- **Encourage Conflict Resolution Mechanisms:** Where possible, recommend third-party mediation or facilitated workshops to address interpersonal conflicts before they escalate into dysfunction.
- **Implement Council Development Sessions:** Annual check-ins or retreats, ideally led by an external facilitator, can help reset working relationships, establish shared priorities, and improve teamwork.
- **Facilitate Constructive Debate:** Highlight the difference between healthy policy debates and unproductive arguing. Encouraging solution-focused discussions helps ensure governance remains functional.
- **Document Incidents:** If conflicts escalate into persistent incivility, keep detailed records of interactions, disruptions, and attempts at resolution. This documentation can be useful for assessing patterns and potential interventions.

Dealing with a Rogue Council

A rogue Council—where members act outside established procedures, disregard governance norms, or engage in incivility—poses a significant challenge for the CAO. In such cases, protecting the integrity of the administration and municipal operations is critical.

- **Set Boundaries and Uphold Governance Principles:** Reiterate that Council members must operate within municipal bylaws, policies, and the Code of Conduct. Enforce procedural rules to maintain order.
- **Engage the Mayor or Deputy Mayor:** Where appropriate, work with the Mayor (or Deputy Mayor if the Mayor is part of the issue) to encourage adherence to governance best practices.
- **Seek External Guidance:** If Council dysfunction threatens municipal stability, consider recommending governance training or an external advisor to provide structure and reinforce responsibilities.
- **Address Violations Through Formal Procedures:** If individual Council members act inappropriately, follow the proper channels, whether through a governance committee, municipal solicitor, or formal complaints process.
- **Consider Escalation If Necessary:** If governance is breaking down, options may include seeking provincial intervention (where applicable), legal advice, or reviewing the possibility of external oversight mechanisms.

By proactively managing conflicts and enforcing governance best practices, the CAO can mitigate dysfunction, maintain municipal stability, and ensure Council remains focused on serving the community effectively.

CAO Pro Tip: Consider engaging a mentor or peer network to gain insights into navigating complex political environments, particularly if there is friction within Council.

Council Orientation Best Practices

Council Orientation is crucial for fostering effective governance and collaboration between Council and administration. As CAO, you play a critical role in shaping Council Orientation to set the tone for effective governance. Collaborate with the Mayor and returning Council members to design an agenda that balances legislative requirements with practical insights on municipal operations and CAO-Council roles. Introduce foundational topics such as good governance principles, your municipality's strategic plan, financial health, key priorities, and decision-making processes. Bring in external experts if needed (e.g. legal counsel for code of conduct training). Ensure the session also fosters relationship-building among Council members and between Council and administration. Most importantly, position yourself as a neutral, trusted advisor committed to supporting Council's success.

CAMA's Council Orientation Toolkit is an invaluable resource, offering guidelines, best practices, and templates. Below are core components to include:

Orientation Focus Area	Key Actions and Tips
Introduce Governance Principles	New Council members benefit from guidance on governance and municipal leadership. CAMA's Political Acumen Toolkit can help articulate these concepts. • **Clarify Roles and Responsibilities:** Differentiate governance (Council) from administration (CAO/staff) using visuals like charts. • **Explain Decision-Making Processes:** Outline how decisions are made, documented, and shared, using real-world governance examples.
Provide an Organizational Overview	Help Council grasp the municipality's structure and key functions. • **Introduce the Leadership Team:** Schedule meetings with department heads to build relationships and review goals. Share a contact directory with leadership responsibilities. • **Review Key Projects:** Highlight major initiatives to align Council's priorities with operations, using dashboards or presentations for concise updates.
Equip Council with Essential Tools and Resources	Ensure Council has the resources to fulfill its governance role effectively. • **Orientation Binder or Portal:** Compile strategic plans, budgets, bylaws, and key documents in a centralized binder or digital portal with regular updates. • **Training Sessions:** Offer governance, finance, and legislative training. Use CAMA resources or external experts for workshops on topics like decision-making and ethics.
Foster Collaboration and Trust	Strengthen relationships and promote alignment early. • **Team Building:** Host retreats or workshops to build cohesion and address potential conflicts. • **Encourage Open Communication:** Schedule regular check-ins and use feedback tools like surveys to ensure Council feels heard and supported.
Tailor Orientation to Local Context	Customize your program to suit your municipality's needs and Council composition. • **Leverage CAMA Resources:** Refer to the CAMA Council Orientation Toolkit for adaptable templates, checklists, and sample presentations. • **Include Facility Tours:** Organize tours of municipal facilities to provide practical insights into operations and services. Enhance tours with GIS tools or narrated sessions by department heads to offer a dynamic learning experience.

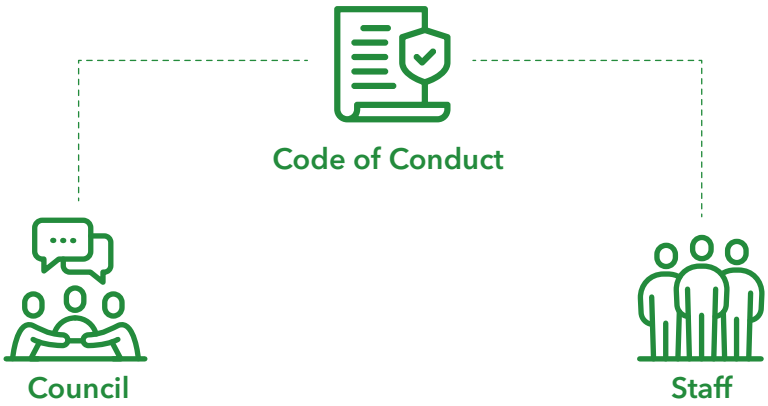
CAMA's Council Orientation Toolkit

CAMA's Council Orientation Toolkit includes checklists, mock meeting templates, and team-building strategies to help CAOs design orientation programs that empower Councils to govern effectively.

By applying these best practices, you can create an orientation that fosters confidence, knowledge, and collaboration between Council and administration.

GUIDELINES FOR DEVELOPING AND IMPLEMENTING A CODE OF CONDUCT FOR ELECTED OFFICIALS AND STAFF

A well-crafted Code of Conduct is essential for establishing clear expectations and standards of behaviour for elected officials and staff. In addition to adopting a Code of Conduct, review your municipality's Workplace Harassment Policy to ensure it aligns with the behavioural expectations set for both staff and Council—and that it complies with applicable legislation.



Here's how to develop and implement an effective Code of Conduct:

Define Objectives and Scope	Clearly articulate the objectives of the Code of Conduct. Specify its scope, including who it applies to (e.g. elected officials, staff, volunteers) and the behaviours it addresses.
Consult Stakeholders	Involve key stakeholders in the development process, including elected officials, senior staff, and legal advisors. Their input ensures that the Code reflects diverse perspectives and addresses relevant issues.
Establish Clear Standards	Outline specific behavioural standards and expectations. Include guidelines on professionalism, respect, integrity, and accountability. Ensure the Code addresses both direct and indirect forms of incivility.
Provide Examples and Scenarios	Include concrete examples and scenarios to illustrate acceptable and unacceptable behaviours. This helps to clarify expectations and make the Code more understandable and actionable.
Include Procedures for Reporting and Addressing Violations	Define clear procedures for reporting and addressing violations of the Code. Specify who to contact, how to file a complaint, and the process for investigating and resolving issues.
Ensure Accessibility and Visibility	Make the Code of Conduct easily accessible to all relevant parties. Distribute it through various channels, such as employee handbooks, organizational websites, and training sessions.
Implement Training Programs	Provide training for all individuals covered by the Code. Training should focus on understanding the Code, recognizing unacceptable behaviour, and following reporting procedures.
Promote Compliance and Accountability	Reinforce the importance of adherence to the Code through regular communications and by holding individuals accountable for violations. Ensure that consequences for breaches are fair and consistently applied.

CAO Pro Tip: Involving City Council in Writing the Code of Conduct

A key tip for fostering a resilient team culture is to involve City Council in the creation of the Code of Conduct. By engaging Council members in this process, you ensure their buy-in and commitment to upholding the standards set forth. It's equally important that every new employee and Council member receives a copy of the Code of Conduct upon starting their position. This practice ensures that all members of the organization are aware of the expected behaviours and ethical standards from the outset, promoting a culture of respect and accountability from day one.

Note: While a robust Code of Conduct is crucial, its effectiveness is often limited by the Council's willingness to adhere to it. The frustration can arise when addressing issues of respect and decency through legal means rather than through legislative reform. CAOs should be cautious not to rely solely on a strong Code of Conduct to solve deeper systemic issues. Advocacy for legislative change in your Province/Territory may be necessary to address these challenges more effectively. Creating a Code of Conduct should be seen as a part of a broader strategy that includes advocacy and a commitment to continuous improvement in governance practices.

STRENGTHEN INTERNAL, EXTERNAL & COMMUNITY RELATIONSHIPS

With cultural alignment and Council relationships taking shape, broadening your focus to external stakeholders is your next priority. Whether it's your staff, Council, or the community, your credibility as CAO hinges on clear, open communication and relationship-building. In this section, we cover how to foster trust and visibility both inside your organization and across your broader community network.

Communicating with Staff, Council, and the Public

Effective communication is one of the most critical skills a new CAO must master in the first 100 days. As the municipality's top administrator, you set the tone for transparency, trust, and collaboration. Strong communication ensures that staff feel supported, Council understands your role and priorities, and the public remains informed and engaged.

Communicating with Staff: Building Internal Trust and Engagement

Your leadership team and municipal staff will look to you for guidance, clarity, and stability. Establishing open and transparent communication early on builds credibility and fosters a collaborative work environment.

- **Introduce Yourself and Your Vision**
  - Hold meet-and-greet sessions or town hall meetings with staff.
  - Share your leadership approach and priorities while emphasizing teamwork and shared goals.
  - Actively listen to staff concerns and feedback to build trust.
- **Be Present and Approachable**
  - Maintain an open-door policy where possible, ensuring staff feel comfortable reaching out.
  - Walk the halls, visit departments, and get to know employees at all levels.
  - Recognize and appreciate staff contributions early and often.

- **Clarify Expectations and Strengthen Workplace Culture**
  - Reinforce the importance of professionalism, ethics, and collaboration.
  - Provide clear organizational priorities to help staff understand their role in achieving municipal goals.
  - Hold regular check-ins with senior leadership to maintain alignment and momentum.

Communicating with Council: Establishing a Strong Working Relationship

Your relationship with Council is one of the most important factors in your success as a CAO. In your first 100 days, focus on building credibility, setting expectations, and ensuring smooth governance. **CAMA's Toolkit for Effective Chief Administrative Officers: The Right Questions to Ask** outlines some questions to help establish a strong Council-CAO working relationship.

- **Schedule One-on-One Meetings with Each Council Member**
  - Learn about their priorities, concerns, and perspectives on municipal issues.
  - Understand their leadership styles and communication preferences.
  - Build a foundation of mutual trust and respect. CAMA's
- **Clarify Your Role as CAO**
  - Educate Council on the distinction between policy (Council's role) and administration (your role).
  - Reinforce that your role is to implement Council's decisions and provide objective, professional advice.
- **Establish a Clear and Predictable Flow of Information**
  - Determine how Council members prefer to receive information (e.g., formal reports, summaries, verbal briefings).
  - Keep communication timely, factual, and professional.
  - Provide regular CAO updates (e.g., weekly email summaries or reports) to keep Council informed without overwhelming them.
- **Be Proactive in Addressing Issues and Concerns**
  - Anticipate challenges and provide solutions before they escalate.
  - Ensure transparency—Council members should never be surprised by major developments.
  - Support strategic, long-term planning rather than reacting solely to immediate pressures.

CAO Pro Tip: Remain politically neutral but build relationships with all Council members based on respect and professionalism.

Communicating with the Public: Fostering Transparency and Engagement

Public perception of your leadership as CAO will be shaped by how effectively you engage, inform, and respond to residents. Open and clear communication helps build trust and reinforces the municipality's commitment to serving the community.

- **Make a Strong First Impression**
  - Introduce yourself to the community through a welcome message, newsletter, or media release.
  - Share your commitment to transparency, good governance, and community engagement.
  - Attend local events, community meetings, and stakeholder gatherings to demonstrate accessibility.
- **Ensure Consistent and Accessible Public Communication**
  - Work with your communications team to align messaging across the website, social media, and traditional media.
  - Keep all external communications clear, concise, and transparent.
  - Provide regular municipal updates through newsletters, social media, or town halls.
- **Handle Public Concerns and Issues Effectively**
  - Acknowledge concerns promptly and professionally—even when you don't have an immediate solution.
  - Encourage open dialogue through public engagement sessions and online forums.
  - Be proactive in sharing key municipal initiatives and decisions to prevent misinformation.

Your first 100 days as CAO are a crucial period to establish your leadership presence and build trust. By prioritizing clear, consistent, and professional communication with staff, Council, and the public, you will lay the groundwork for effective governance, a strong workplace culture, and positive community relations.

The Power of Appreciation: How a CAO's Recognition Transforms Workplace Culture

As a CAO, your leadership sets the tone for the entire organization. One of the most impactful yet often overlooked leadership tools is recognition—genuinely acknowledging the hard work and contributions of employees. Recognition fosters loyalty, boosts morale, and reinforces a positive workplace culture. A simple, heartfelt acknowledgment from the CAO can carry more weight than any formal performance review or incentive program.

Why Employee Recognition Matters

- Increases Engagement & Productivity – Employees who feel valued are more motivated to contribute their best efforts.
- Strengthens Retention – A culture of recognition reduces turnover by making employees feel seen and appreciated.
- Builds Trust & Positive Workplace Culture – When leadership openly values staff contributions, it encourages a culture of respect and collaboration.
- Reduces the 'Us vs. Them' Mentality – Employees who only hear from the CAO during budget cuts or crises may feel disconnected. Regular recognition bridges that gap.

Ways a CAO Can Recognize Staff Effectively

1 Be Specific and Personal

Generic praise like "Good job, team!" is nice, but direct, specific recognition is more meaningful. Saying, "Julie, I really appreciated how you handled that challenging resident complaint with professionalism and patience" shows that you noticed and value her effort.

2 Recognize Publicly (When Appropriate)

A simple shout-out at a staff meeting, a mention in a municipal newsletter, or a thank-you note can go a long way. Public recognition reinforces positive behaviours and sets a standard for excellence. However, some employees prefer private recognition, so be mindful of individual preferences.

3 Celebrate Milestones and Small Wins

Recognizing major career milestones like retirements or promotions is expected, but acknowledging smaller achievements—such as successfully launching a new project or handling a difficult situation—builds a culture of appreciation.

4 Create a Habit of 'Catching People Doing Things Right'

It's easy to focus on fixing problems, but don't let great work go unnoticed. Take moments throughout the week to actively look for employees going above and beyond and acknowledge them.

5 Lead by Example

Encouraging department heads and managers to recognize their teams regularly starts with you. When employees see the CAO practicing recognition, they're more likely to pass that culture down the chain of command.

Recognition doesn't have to be elaborate—it just needs to be genuine. Employees don't forget the moments when their hard work is acknowledged by leadership. A CAO who prioritizes recognition fosters a workplace where people feel valued, motivated, and proud of their contributions, ultimately driving the organization's success.

Strengthening Municipal Trust Through Strategic Media & Public Relations

Media and Public Relations Essentials

As a CAO, you are a key ambassador for your municipality, shaping its public image and fostering trust through transparent, proactive communication. Your leadership in media relations, public messaging, and crisis communication directly influences the municipality's credibility and reputation. A strategic approach ensures that every message reflects municipal values, meets community needs, and aligns with organizational goals.

1 Establish Professional Media Protocols

Develop clear protocols to ensure consistent, professional interactions with media. Define spokesperson roles (CAO, Mayor, or senior leader) based on the issue. Standardize response procedures, approval processes, and media training to prevent conflicting messages and enhance readiness.

2 Craft Purposeful Public Messaging

Ensure all communications—from press releases to social media—are consistent, transparent, and reflect the municipality's values. Engage proactively, share both successes and challenges, and use plain language and visuals to make complex topics, such as budgets, easily understood.

3 Build Constructive Media Relationships

Foster partnerships with local journalists by providing timely, accurate information. Regular media briefings, responsive engagement, and informal relationship-building improve reporting accuracy and reduce misinformation.

4 Execute Crisis Communication with Confidence

In a crisis, speed and clarity are vital. Acknowledge issues promptly, provide ongoing updates, and use empathetic, reassuring language to maintain public trust. A robust Crisis Communication Plan streamlines responses and mitigates reputational risk.

5 Leverage Multi-Channel Communication

Tailor messages across diverse platforms—from traditional media to social media, newsletters, and public forums—to maximize reach and engagement. Match content to each platform's strengths, combining concise updates with visual storytelling.

6 Monitor Public Perception and Respond Proactively

Stay ahead of public sentiment using media monitoring and social listening tools. Address misinformation swiftly and engage with residents to reinforce credibility.

7 Equip Staff and Leaders with Media Skills

Conduct media training for senior staff and elected officials to ensure confident, unified messaging. Teach bridging techniques and provide opportunities for mock interviews to refine communication under pressure.

8 Promote Community Success Stories

Showcase achievements that build civic pride. Share compelling narratives about municipal projects, staff milestones, and resident contributions through multimedia campaigns that humanize and celebrate municipal efforts.

9 Embrace Emerging Communication Trends

Adopt innovative platforms such as live-streaming and podcasts to reach broader audiences. Enhance accessibility through inclusive design, such as captioning videos and offering multilingual content.

10 Continuously Improve Communication Strategy

Evaluate public relations efforts regularly through feedback, analytics, and benchmarking. Use insights to refine communication plans and adopt best practices to enhance transparency and engagement.

Mastering media and public relations strengthen your municipality's reputation and community trust. Through strategic leadership and communication, CAOs position themselves—and their organizations—as effective, respected public servants.

CAO Insight: Visibility with Purpose – Navigating Social Media and Public Presence

Social media is a powerful tool in municipal communication—one that allows you to foster transparency, engage residents in real time, and showcase service delivery. However, as CAO, your presence on these platforms requires careful intention. Unlike elected officials who are expected to maintain a public profile, your role is to lead with professionalism, humility, and organizational focus.

Participating in hands-on experiences—such as driving the Zamboni, joining a road crew for a day, or attending community events—can build connection and trust. But when sharing these moments publicly, the key is to keep the spotlight on staff contributions, municipal services, and community pride—not personal promotion.

Why This Matters:

- **Public Trust:** Residents respond positively to leaders who are relatable and respectful of the role they play. Highlighting staff and services helps demonstrate the impact of local government.
- **Governance Boundaries:** The Mayor and Council are the political face of the municipality. Frequent CAO visibility—especially on social media—can blur governance lines or appear to compete for public attention.
- **Internal Morale:** Staff who feel recognized and appreciated, particularly when acknowledged publicly, are more engaged, loyal, and proud of their work.

Best Practices for CAO Engagement on Social Media:

- **Celebrate Staff:** Use your platform to acknowledge frontline teams and behind-the-scenes efforts. Always give credit.
- **Lead with Humility:** When featured in a post, focus the story on others—not yourself.
- **Stay Aligned with Council:** Know your Council's preferences for CAO visibility. Avoid posts that could be interpreted as political or promotional.
- **Be Intentional:** Aim for quality over quantity. Visibility is most powerful when it supports transparency, appreciation, or community connection.

CAO Pro Tip: As a CAO, your leadership is most impactful when it elevates others—your staff, your Council, and your community. While occasional visibility builds trust and connection, overexposure—especially in the media or on social platforms—can blur governance lines and shift focus away from your true role: supporting Council's leadership and ensuring organizational excellence. Use your platform to spotlight the work of your team, align with Council's direction, and reinforce good governance. Visibility is powerful—when guided by purpose, humility, and intention.

TEAM LEADERSHIP DEVELOPMENT

Strong CAOs don't lead alone. As momentum builds, it's essential to empower your leadership team to step up alongside you. This section focuses on strengthening your senior team's involvement in Council engagement and strategic leadership, setting the stage for collaborative, distributed leadership throughout the organization.

Empowering Your Senior Leadership Team: Preparing for Council Engagement

As a CAO, one of the most valuable opportunities you can provide your senior leadership team is exposure to Council meetings. Inviting department heads and senior staff to attend and present at these meetings not only gives them firsthand experience in the governance process but also helps build their confidence in engaging with elected officials. This practice fosters professional growth, strengthens their ability to communicate strategic initiatives, and reinforces a culture of shared leadership. By ensuring your team is well-prepared and visible in these settings, you are not only supporting their success but also enhancing Council's understanding of the expertise and insights that drive municipal operations. A strong leadership team reflects a strong municipality—when your staff succeeds, the organization thrives.

PERSONAL LEADERSHIP FOCUS

While leading the organization and aligning key stakeholders, it's equally important to position yourself as a results-oriented leader. Early wins—small but impactful actions—will demonstrate your effectiveness to both Council and staff. This final section of Phase 2 will help you identify quick successes that boost morale, establish your leadership credibility, and build confidence as you prepare for longer-term initiatives.

Early Wins: Setting the Tone for Your Leadership

Quick wins are highly visible achievements that demonstrate your effectiveness early on. Examples include:

- **Addressing Low-Hanging Fruit:** Resolve small but impactful issues, such as improving internal communication or streamlining a routine process.
- **Delivering on Council's Priorities:** Identify a project that aligns with Council's immediate goals, then lead the team to show measurable progress within your first 60 days.
- **Improving Staff Engagement:** Hold an all-staff meeting to introduce yourself, share your vision, and listen to feedback. Consider launching a simple employee engagement survey early in your tenure—this signals your commitment to listening, builds trust, and helps identify areas for alignment and improvement.
- **Enhancing Public Communication:** Implement a quick improvement to public communication, such as launching a social media campaign or updating the municipality's website.

QUICK WIN: In one municipality, a new CAO's quick win was resolving a long-standing staff morale issue by implementing regular town hall Q&A sessions, which immediately improved engagement scores.

By the end of Day 60, you will have created a solid foundation of trust, governance clarity, and stronger relationships. With momentum on your side, you're ready to move confidently into the next phase: driving strategy, operational excellence, and long-term results.

Phase 2 Reflection Questions

1. What recurring themes have emerged from your conversations with staff regarding morale and culture?
2. Have you identified any informal networks or power dynamics that could influence decision-making?
3. Are there areas where your leadership style can be better aligned with the organizational culture while staying authentic?
4. Have you clarified governance roles with Council to minimize overlap or confusion between governance and management?
5. What steps have you taken to reinforce CAO-Council communication protocols?
6. How is your relationship evolving with individual Council members—have you established trust and credibility?
7. Have you created opportunities for your senior leadership team to engage directly with Council or participate in strategic discussions?
8. Are you seeing early signs of improved collaboration or engagement from your leadership team?
9. Have you broadened your external network (Power Wheel) to include key community partners and regional stakeholders?
10. Are you visible and accessible to the community and media? What feedback have you received so far on public communications?
11. What early wins have you secured that are visible to Council, staff, or the public?
12. How are you reinforcing trust and credibility through your actions and communication style?
13. Are you regularly acknowledging and recognizing staff contributions?
14. Have you encountered any internal tensions or conflicts that require proactive resolution?
15. Are there areas where external partnerships or public visibility need more attention?

PHASE 2 CHECKLIST: BUILD MOMENTUM & LEAD WITH ALIGNMENT (DAYS 31-60)

Evaluate Organizational Culture

- ☐ Assess team morale and workplace culture through surveys and informal conversations.
- ☐ Engage with frontline staff for candid feedback on day-to-day operations.
- ☐ Identify blind spots and informal dynamics that influence decision-making.
- ☐ Begin identifying areas where cultural change may be needed.

Refine Governance & Council Relations

- ☐ Review and clarify CAO-Council roles and responsibilities (governance vs. management).
- ☐ Initiate or schedule governance orientation or refresher workshops using the **CAMA Council Orientation Toolkit**.
- ☐ Support the Mayor's leadership role in meetings and help manage Council dynamics.
- ☐ Establish or review CAO-Council protocols (e.g. communication expectations, decision-making boundaries).

Strengthen Internal, External & Community Relationships

- ☐ Continue building trust and visibility with staff through regular walkarounds and open-door sessions.
- ☐ Expand your Stakeholder Power Wheel by identifying and engaging key external partners (e.g. community organizations, First Nations, regional agencies).
- ☐ Develop or refine an external communications plan to enhance transparency and public trust.
- ☐ Strengthen relationships with media through informal meetings or interviews.

Team Leadership Development

- ☐ Empower your leadership team by involving them in Council briefings, meetings, or presentations.
- ☐ Begin identifying leadership gaps and reviewing existing succession plans.
- ☐ Recognize and mentor emerging leaders within your organization.

Personal Leadership Focus & Early Wins

- ☐ Identify and implement quick wins (e.g. resolve a nagging operational issue or enhance internal communication).
- ☐ Model behaviours that foster trust and professionalism—lead by example in communication, recognition, and decision-making.
- ☐ Begin reinforcing a culture of staff appreciation and regular recognition.
- ☐ Position yourself as a collaborative and approachable leader to both internal and external stakeholders.

Having built momentum and strengthened internal alignment, you are now positioned to solidify trust and set a course for long-term success. Phase 3 is about shifting from tactical wins to shaping your leadership legacy, embedding operational excellence, and preparing the organization for sustained progress.

PHASE 3: CHART THE COURSE: SHAPE THE FUTURE WITH CONFIDENCE (DAYS 61-100)

As you enter the final stretch of your first 100 days, your leadership focus shifts to solidifying trust and setting the course for long-term success. This is where early momentum transitions into sustained action. With foundational relationships and governance clarity established, Phase 3 is about delivering measurable wins, aligning your leadership team, and communicating results internally and externally to reinforce confidence in your leadership.

Phase 3: Chart the Course: Shape the Future With Confidence (Days 61-100)

Goal: Deliver measurable wins, position your municipality for long-term success, and solidify trust.

1 Establish a Priority Action Plan

- ✓ Align initiatives with Council's strategic goals and begin implementing short-term projects with measurable outcomes.
- ✓ Launch or refine performance & reporting frameworks (KPIs, regular updates to Council and staff).

2 Build a High-Performing Leadership Team

- ✓ Formalize expectations and accountability structures within your senior leadership team.
- ✓ Support professional development, mentorship, and leadership succession within your organization.

3 Foster a Culture of Recognition & Trust:

- ✓ Celebrate early wins, acknowledge staff contributions, and promote a positive workplace culture.
- ✓ Strengthen team cohesion through recognition programs and cross-departmental collaboration.

4 Communicate for the Long-Term:

- ✓ Enhance public and media relations through proactive communication and storytelling (e.g. celebrating community achievements, addressing emerging issues transparently).
- ✓ Reinforce CAO-Council trust through consistent briefings and solution-oriented leadership.

5 Personal Leadership Focus:

- ✓ Reassess work-life balance and leadership well-being strategies.
- ✓ Continue mentorship engagement and peer support to refine leadership style.

Pitfalls to Avoid in Phase 3:

- ✓ Don't rush major organizational restructures—ensure readiness.
- ✓ Avoid focusing only on internal operations—keep public and Council engagement high.
- ✓ Don't neglect ongoing trust-building through follow-up and accountability.

ESTABLISH A PRIORITY ACTION PLAN

A focused Priority Action Plan will serve as your strategic anchor, translating early observations and Council priorities into tangible results. At this stage, your plan should highlight short- and medium-term projects aligned with Council's strategic goals and community needs.

Key Elements of a Priority Action Plan:

1. **Align with Council's Strategic Vision:** Ensure your initiatives directly reflect the Council's approved Strategic Plan or key priorities discussed during onboarding.
2. **Define Quick Wins and Foundational Projects:** Identify projects that can be completed or advanced within the next six to twelve months to maintain momentum.
3. **Set Measurable Outcomes:** Establish clear KPIs for each project (e.g. service delivery improvements, financial benchmarks, or community engagement metrics).
4. **Integrate Regular Reporting:** Develop a schedule for providing Council, staff, and the community with progress updates, reinforcing transparency and accountability.
5. **Involve Your Leadership Team:** Engage senior staff in finalizing and executing the plan to ensure buy-in and distribute ownership across departments.

CAO Pro Tip: Prioritize projects that solve visible community or organizational pain points. Early wins that resonate with both Council and residents help reinforce your credibility as a results-oriented leader.

Establishing a Performance & Reporting Framework

An effective performance framework helps sustain trust by holding the organization accountable and demonstrating tangible progress. Begin implementing short-term projects and outline how progress will be monitored using KPIs and Council updates.

Steps to Build Your Framework:

1. **Select Key Performance Indicators (KPIs):** Tailor KPIs to your municipality's goals, focusing on service delivery, financial stewardship, community engagement, and employee well-being.
2. **Develop Clear Reporting Structures:** Standardize how performance is communicated to Council (e.g. quarterly scorecards, dashboards, or Council updates).
3. **Involve Staff:** Encourage departments to participate in KPI development to ensure realistic and meaningful metrics.
4. **Create Feedback Loops:** Integrate Council, staff, and community feedback to continuously refine KPIs and reporting tools.
5. **Celebrate Achievements Publicly:** Use performance reporting as a tool to highlight successes and show the community that municipal priorities are being delivered.

CAO Pro Tip: When reporting to Council, keep information concise but meaningful. Focus on high-level overviews that clearly link KPIs and outcomes to Council's strategic priorities. Always provide context to help Council and staff understand both the results and the story behind them—this reinforces alignment and supports informed decision-making.

DEVELOP AND LEAD A HIGH-PERFORMING LEADERSHIP TEAM

A capable and resilient senior leadership team is critical to effective municipal governance and long-term success. As CAO, one of your core responsibilities is to ensure the right people are in key roles, foster a culture that attracts and retains top talent, and lead the team with intention. A high-performing team not only delivers on Council's strategic priorities but also ensures organizational stability and operational excellence.

Building and Retaining a Strong Leadership Team

1 Define Core Competencies and Expectations

- Identify the essential skills, experience, and leadership attributes needed to meet municipal priorities.
- Align hiring and promotion criteria with Council's strategic objectives to secure the right talent.
- Set clear performance goals and strategic priorities for each leadership team member, supported by regular evaluations and constructive feedback.

2 Strengthen Your Talent Pipeline

- Implement succession planning to prepare for leadership transitions.
- Identify internal talent and provide mentorship or development opportunities to groom future leaders.
- Encourage cross-training to create bench strength within departments.

3 Foster a Competitive and Supportive Environment

- Offer competitive compensation and non-monetary benefits such as professional development, flexible work arrangements, and wellness initiatives.
- Create a positive work culture that values trust, collaboration, and innovation.

4 Enhance Onboarding and Leadership Development

- Ensure new leaders are equipped for success through comprehensive onboarding, clear expectations, and mentorship.
- Invest in leadership development programs and encourage continuous learning and participation in external forums or networks.

5 Cultivate a Culture of Engagement and Recognition

- Promote open communication and a team-oriented approach to problem-solving.
- Regular leadership meetings provide opportunities to align on priorities, share updates, and address challenges.
- Celebrate individual and team successes through both formal and informal recognition.
- Encourage senior leaders to surface challenges and innovative ideas, fostering continuous improvement and engagement.

Leading Your Senior Leadership Team

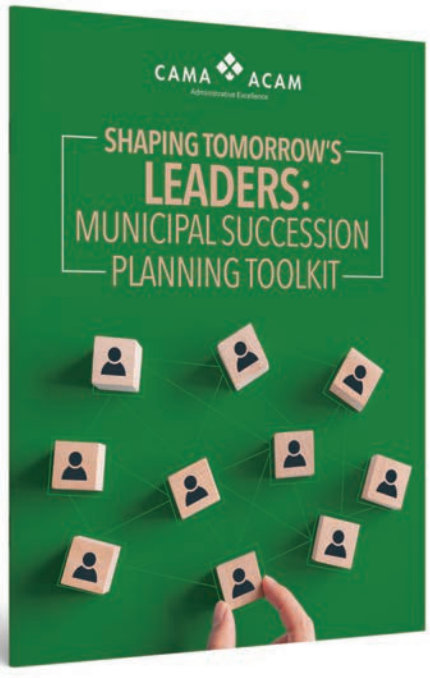
Once your leadership team is in place, your role as CAO is to lead with intention—fostering collaboration, providing clear direction, and ensuring accountability. Your leadership sets the tone for the organization and is vital for implementing Council's priorities, maintaining operational efficiency, and driving municipal success.

- **Adapt Your Leadership and Communication Style:** Tailor your approach to suit the diverse communication styles of your leadership team. Some may prefer detailed reports, while others respond better to verbal updates. Flexibility ensures information is effectively conveyed and understood.
- **Lead by Example:** Model ethical leadership, professionalism, and resilience in every interaction. A supportive and solutions-focused approach fosters a workplace culture where staff feel valued, motivated, and engaged.

By focusing on both recruitment and retention, while leading with purpose, CAOs can cultivate a high-performing leadership team that drives results, supports service delivery, and contributes to a resilient organization and a positive, high-performance workplace culture.

CAO Pro Tip: Your team will mirror your leadership—if you model trust, accountability, and collaboration, your leadership team will do the same.

CAMA's "**Shaping Tomorrow's Leaders: Municipal Succession Planning Toolkit**" is a comprehensive resource designed to help municipalities ensure smooth leadership transitions and long-term organizational stability. Whether your municipality has a Human Resources Department or not, this Toolkit offers practical strategies and customizable tools for CAOs, leadership teams, and Councils.



TOP 10 WAYS TO BUILD TRUST WITH COUNCIL AND STAFF

Trust is the foundation of effective leadership, and as a new CAO, earning the confidence of both Council and staff is critical to your success. Trust is not built overnight—it requires consistency, transparency, and respect. Here are ten key ways to foster trust and establish strong relationships with both elected officials and employees.

1 Listen Before You Lead

Take time to understand the organization before making major changes. Meet with each Council member and key staff to learn their perspectives, priorities, and concerns. Active listening signals respect and builds credibility early on.

2 Communicate Openly and Consistently

Trust thrives in an environment of transparency. Provide Council with clear, factual information to support decision-making. Keep staff informed about municipal priorities and changes. Regular updates—whether through meetings, emails, or informal conversations—prevent misinformation and foster alignment.

3 Establish Fair and Predictable Decision-Making

Council and staff must feel confident that decisions are made based on sound principles rather than personal relationships or political pressures. Be clear about your rationale, use data to support recommendations, and apply policies consistently.

4 Be Approachable and Present

A CAO who is seen and engaged builds stronger relationships than one perceived as distant. Walk through departments, attend community events, and maintain an open-door policy. Small interactions reinforce accessibility and break down the intimidation factor of the position.

5 Follow Through on Commitments

Reliability builds trust. Whether it's delivering on a promise to follow up, implementing a decision, or responding to concerns, following through—especially on small commitments—demonstrates integrity. If circumstances change, communicate the reasons clearly.

6 Respect the Role of Council

Understanding the difference between governance and administration is key. Council sets policy, and the CAO ensures its implementation. Avoid taking sides in political disagreements and remain neutral in Council conflicts. Providing professional, objective advice—regardless of whether it aligns with individual opinions—reinforces trust in your leadership.

7 Empower and Trust Your Leadership Team

Micromanagement erodes trust. Delegate responsibilities to senior staff, recognizing their expertise. Publicly support their decisions and privately provide constructive feedback when needed. Trusting staff fosters a culture of accountability and shared success.

8 Recognize and Appreciate Contributions

Recognition fuels motivation and strengthens workplace culture. Acknowledge Council members' efforts in advancing municipal priorities and appreciate staff for their hard work. A simple thank-you, a mention in a meeting, or a written note can go a long way in reinforcing positive relationships.

9 Address Challenges Proactively and Fairly

When conflicts arise—whether among Council members or within staff—address them with fairness and professionalism. Avoid avoidance; instead, use structured conflict resolution strategies to keep issues from escalating. A CAO who navigates challenges transparently earns lasting respect.

10 Lead with Integrity and Stability

In times of uncertainty, people look to the CAO for steady leadership. Stay calm under pressure, maintain ethical standards, and act with integrity in every decision. Stability fosters confidence, and confidence fosters trust.

By prioritizing transparency, respect, and follow-through, you will establish yourself as a trusted leader—one who builds strong relationships and ensures that the municipality operates effectively. Trust is your greatest asset as a CAO, and it is earned through everyday actions.

COMMUNICATE FOR THE LONG-TERM

Strong, consistent communication cements your leadership presence both internally and externally. Now is the time to shift from introductory messaging to deeper engagement.

Key Strategies:

1. **Enhance CAO-Council Communications:**
   - Establish a rhythm of regular briefings that focus on solutions and progress.
   - Tailor communications to individual Council members' preferred styles (e.g. detailed memos vs. verbal summaries).
2. **Strengthen External Partnerships:**
   - Schedule touchpoints with regional partners, Indigenous governments, and community organizations to reinforce long-term collaboration.
3. **Elevate Public Engagement:**
   - Collaborate with your communications team to tell your municipality's story (e.g. highlight early wins, staff contributions, and community impact through newsletters, social media, and media outreach).
   - Begin laying the groundwork for long-term engagement initiatives such as community surveys, public consultations, or forums.
4. **Maintain Staff Engagement:**
   - Continue regular staff communications, recognizing that early enthusiasm can wane. Keep morale high through authentic updates, celebrating progress, and reinforcing shared goals.

PERSONAL LEADERSHIP FOCUS – STRENGTHEN YOUR RESILIENCE AS A CAO

Sustaining your leadership presence over the long term requires prioritizing your well-being, professional development, and support network. As you prepare to move beyond the first 100 days, take time to reflect on your leadership effectiveness and self-care.

- **Reassess Work-Life Balance:** Be intentional about protecting personal well-being amidst the demands of the role. Consider scheduling time for recovery and reflection to maintain resilience.

CAO Pro Tip: Great leaders stay grounded by investing as much in their own growth as they do in their teams.

- **Engage with Mentors and Peers:** Regularly check in with trusted peers, mentors, or a professional network (e.g. CAMA) to gain fresh perspectives and leadership insights.
- **Refine Your Leadership Style:** Reflect on feedback you've received from Council, staff, and stakeholders. What leadership behaviours have contributed most to trust and progress? Identify small adjustments to fine-tune your approach.
- **Stay Curious:** Commit to ongoing learning through reading, leadership forums, or training sessions that will prepare you for emerging trends and challenges in local government.

CAO Pro Tip: Lead, Don't Just React

Set boundaries early, even if it feels uncomfortable—it protects your energy and your role. Don't wait until you're struggling to reach out. Use your networks, seek mentors, and build a circle that reminds you that you're not alone in this.

Phase 3 Reflection Questions

1. Have you secured visible early wins that reinforce confidence with Council, staff, and the public?
2. Is your Priority Action Plan clearly aligned with Council's strategic priorities and operational needs?
3. Are your KPIs meaningful, measurable, and clearly linked to organizational goals?
4. Is your senior leadership team operating as a cohesive, empowered unit with clearly defined roles?
5. Have you initiated or strengthened succession planning for key leadership positions?
6. What actions have you taken to foster a culture of recognition and appreciation among staff?
7. How has your relationship with Council evolved—are you building stronger alignment and mutual trust?
8. Have you maintained consistent, transparent communication with staff, Council, and the public?
9. Are external stakeholders (e.g. community partners, regional governments) engaged and aware of your municipality's direction?
10. What feedback are you receiving from Council, staff, and the public on your leadership and communication style?
11. Are you seeing early indicators of improved workplace culture, morale, and engagement?
12. What leadership habits or communication strategies have proven most effective so far?
13. Are there areas where you need additional support or development (e.g. peer mentorship, training)?
14. How are you managing your work-life balance as demands on your leadership continue to grow?
15. What steps will you take beyond Day 100 to maintain momentum and position the municipality for long-term success?

CAO Pro Tip: Know When (and When Not) to Speak

In staff meetings, speak last. Let your team share ideas and solutions first—your role is to listen, guide, and elevate others' voices. In Council meetings, remember: it's their meeting, not yours. Speak only when your input is necessary to clarify, advise, or protect the integrity of the organization. Strategic silence can be just as powerful as the words you choose to share.

PHASE 3 CHECKLIST: CHART THE COURSE, SHAPE THE FUTURE WITH CONFIDENCE (Days 61-100)

Establish a Priority Action Plan

- ☐ Align short- and medium-term initiatives with Council's Strategic Plan and community needs.
- ☐ Identify and implement early-stage projects with clear, measurable outcomes.
- ☐ Present a draft Priority Action Plan to your senior leadership team and Council for input and buy-in.

Establish a Performance & Reporting Framework

- ☐ Develop and finalize KPIs tailored to your organization's goals (e.g. service delivery, finance, engagement).
- ☐ Implement a standardized reporting process for Council and internal stakeholders (dashboards, briefings, reports).
- ☐ Create a schedule for regular performance reporting to both staff and Council.
- ☐ Celebrate early wins by communicating progress to Council, staff, and the public.

Build a High-Performing Leadership Team

- ☐ Formalize expectations, accountability, and decision-making authority within the senior leadership team.
- ☐ Support leadership development with professional training, mentorship programs, or cross-training initiatives.
- ☐ Begin reviewing or updating succession plans to strengthen leadership continuity.
- ☐ Empower senior staff to take more active roles in Council briefings and community engagement.

Foster a Culture of Recognition & Trust

- ☐ Recognize staff contributions and leadership team successes through both formal and informal methods.
- ☐ Introduce or enhance a staff recognition program that supports cross-departmental collaboration.
- ☐ Share positive results and early successes across the organization to reinforce morale.
- ☐ Continue building trust with Council by consistently following through on commitments.

Communicate for the Long-Term

- ☐ Strengthen CAO-Council relationships through regular, solution-focused briefings and touchpoints.
- ☐ Expand external relationships with key stakeholders (e.g. regional partners, Indigenous governments, community groups).
- ☐ Enhance public engagement through proactive communications (e.g. newsletters, media relations, community events).
- ☐ Begin planning long-term public engagement initiatives (e.g. consultations, surveys, or community town halls).

CAO Pro Tip: Remember: If Council votes against one of your recommendations, it's not a failure. Your role is to provide evidence-based advice, not to control outcomes. Stay confident in your professional judgment and continue supporting Council's decisions with clarity and respect.

Personal Leadership Focus

- ☐ Reflect on your leadership approach and identify areas for refinement or support.
- ☐ Ensure you are maintaining work-life balance and implementing well-being strategies to sustain leadership energy.
- ☐ Engage with a mentor, peer network, or professional association to support continued leadership development.

By the end of Day 100, you will have established the building blocks for a successful tenure—early wins, strengthened relationships, and a team aligned with your leadership vision. The next stage is about sustaining momentum, embedding a culture of trust and accountability, and continuously adapting to the evolving needs of your municipality and community.

Reflection & Mentoring Questions for CAOs

- What has surprised me most in my first 100 days?
- Where do I feel most confident—and where do I feel stretched?
- Have I proactively built a relationship with a mentor or peer CAO?
- What feedback have I received from staff or Council—directly or indirectly?
- What do I need to learn or let go of to be more effective in this role?

Looking Beyond Day 100: Sustaining Success

As you complete your First 100 Days, you will have laid the essential groundwork for trust, team alignment, and early momentum. This milestone marks the beginning—not the end—of your leadership journey. Your focus now shifts toward embedding a culture of accountability, driving strategic initiatives, and continuously adapting to your municipality's evolving needs.

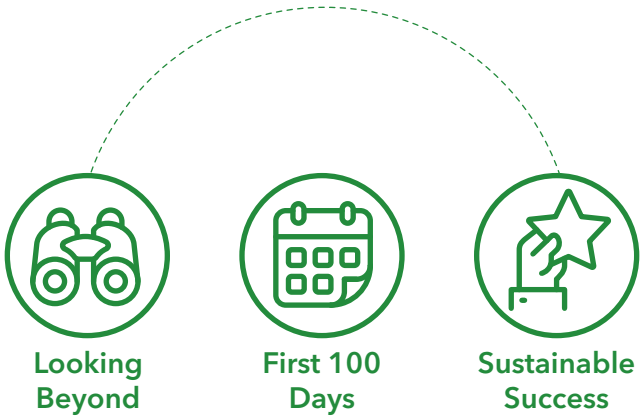
With relationships strengthened, early wins delivered, and a high-performing leadership team in place, you are positioned to move confidently into the next phase: shaping and executing long-term strategies that will define your legacy. Sustain the progress you've made by nurturing partnerships, investing in your people, and maintaining open, collaborative relationships with Council, staff, and the community.

To reinforce alignment and demonstrate accountability, it is recommended to **host a Day 100 Council debrief**. This formal check-in allows you to:

- Review your progress and present key accomplishments from your First 100 Days.
- Outline next steps for executing long-term strategic priorities.
- Seek feedback on your performance, leadership approach, and communication style to ensure continued alignment with Council's expectations.

CAO Pro Tip: A Day 100 debrief with Council is a valuable opportunity to strengthen trust, reinforce your commitment to transparency, and position yourself as a reflective, responsive leader.

The future of your municipality is shaped not just by bold decisions but by the consistency, integrity, and vision you bring every day beyond Day 100.



NAVIGATING THE UNEXPECTED: CAO "WHAT IF" SCENARIOS

A Quick-Response Guide for Common Early Challenges

No matter how well-prepared you are, unexpected challenges will arise. These "What If" scenarios are designed to help you take a breath and consider your first steps — calmly, professionally, and with confidence.

What if the Mayor or a Council Member directs staff directly?

- Clarify that staff report to the CAO under the Municipal Act/bylaws.
- Reinforce the CAO–Council–staff structure calmly and professionally.
- Address the situation directly and respectfully — assume good intent but explain boundaries.
- Follow up in writing to confirm expectations.
- Encourage requests to come through appropriate channels (e.g. Senior Leadership Team or Council meeting).
- Document the incident and handle it professionally, not personally.
- If ongoing, consider governance training or using CAMA's **Council Orientation Toolkit**.

What if Council votes against staff recommendations?

- Respect Council's decision — they govern, you advise.
- Review what went wrong: timing, communication, political implications?
- Debrief with your team to improve how information is presented.
- Offer a constructive next step to Council, if appropriate.
- Avoid defensiveness; focus on supporting implementation of the final decision.

What if the media calls about a confidential issue?

- Do not comment until facts are verified and legal/privacy implications reviewed.
- Refer to your municipal communications policy (or draft one quickly if needed).
- Coordinate messaging with your Mayor (if appropriate) and leadership team.
- Offer a holding statement: "We are aware of the situation and are reviewing it carefully. We'll provide accurate information as it becomes available."
- Document all media interactions and prepare internal talking points for staff.

What if there's a toxic or divided Council dynamic?

- Avoid taking sides — remain the neutral, steady hand.
- Focus on facts, policy, and professionalism in every interaction.
- Establish consistent communication processes with Council as a whole.
- Document decisions and direction carefully.
- Consider engaging a third-party governance consultant if tensions escalate.

What if a member of the public makes a complaint about Council or the CAO?

- Direct complaints about Council to the appropriate authority (e.g. Mayor or Integrity Commissioner).
- If the complaint is about you, ask for specifics and respond professionally.
- Consult legal or Human Resources if the complaint escalates.
- Keep a confidential log of public complaints and how they were handled.
- Don't take it personally — it's often about the role, not you.

LEADING WITH COURAGE: OVERCOMING CONFLICT & ADVERSITY

As a new CAO, you will encounter a range of challenges as you balance the demands of Council, staff, and the community. Your ability to manage conflict, uphold ethical standards, and lead with professionalism will be tested. This section provides in-depth guidance on navigating some of the most complex and common situations CAOs face.

MANAGING GOVERNANCE CHALLENGES: STRONG MAYOR POWERS

The introduction of Ontario's Strong Mayor legislation marks a significant shift in municipal governance, altering traditional power dynamics between the Mayor, Council, and CAO. This change challenges long-standing checks and balances and places greater executive authority with the Mayor, impacting neutrality, operational stability, and staff morale. To succeed in this evolving landscape, CAOs must lead with resilience, clarity, and a strong commitment to professional integrity.

Key areas of focus include reinforcing neutrality by clearly defining the CAO's role as an impartial advisor to the entire Council and safeguarding operational boundaries. CAOs should advocate for formal governance frameworks that clarify responsibilities among the Mayor, Council, and Administration. By promoting best practices—such as ethics training and whistleblower protections—CAOs can support an accountable and transparent environment.

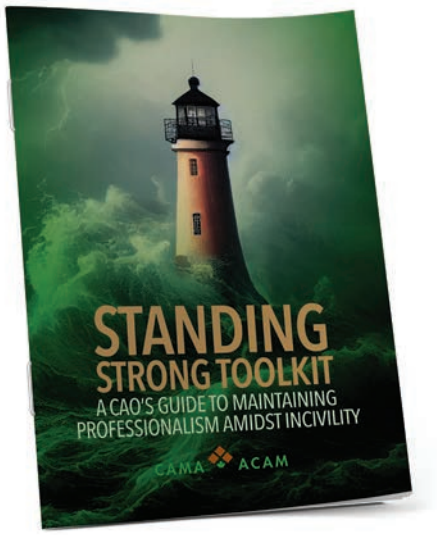
In addition, the increased authority of Mayors over staffing and budgeting requires CAOs to stabilize internal operations by championing merit-based hiring practices and shielding staff from political influence. Proactively collaborating with the Mayor to align financial priorities with long-term community goals will help maintain the CAO's role as a steward of municipal resources.

CAOs are encouraged to foster open communication with both the Mayor and Council, leverage peer networks like CAMA for support, and engage with CAMA's white paper, "**The Role and Significant of the Chief Administrative Officer Position in Canadian Municipal Government: A CAMA White Paper on Ontario's Strong Mayor Legislation and the Pivotal Role of the CAO in Providing Good Governance"** for deeper strategies on navigating the Strong Mayor model while upholding governance excellence.

CAO Pro Tip: Navigating Strong Mayor Powers with Professionalism

If you're a CAO working under Strong Mayor Powers, position yourself as a champion of good governance by proactively initiating Council training and developing a clear, accessible administrative policy manual. These tools help reinforce roles, responsibilities, and accountability—ensuring a balanced, transparent decision-making environment.

MANAGING INCIVILITY AND WORKPLACE CHALLENGES



Navigating the complexities of incivility and workplace challenges is a critical skill for new Chief Administrative Officers (CAOs). Drawing on the principles from **CAMA's Standing Strong Toolkit – A CAOs Guide to Maintaining Professionalism Amidst Incivility**, this section offers insights into handling the emotional rigors of leadership, managing disputes effectively, and addressing harassment or bullying in the workplace.

Handling Emotional Rigors and High-Pressure Situations

The role of a CAO often involves high-stress situations, particularly in environments where incivility is prevalent. Maintaining professionalism and resilience is crucial to effectively navigate these challenges.

1. **Recognize Early Warning Signs:** Deteriorating relationships and escalating tensions among staff or elected officials can signal impending conflicts. Pay close attention to shifts in communication patterns, such as confrontational tones or withdrawn behaviours, to address issues proactively.
2. **Establish Support Systems:** Regular debriefings with senior management teams, especially after contentious Council meetings, can provide a space to share experiences and mitigate stress. Employee Assistance Programs and peer support initiatives are essential for emotional resilience.
3. **Practice Self-Care:** Managing stress effectively through exercise, mindfulness, and setting boundaries is vital. Prioritize activities that restore mental clarity and focus.

Handling Disputes with Council and Staff

Conflicts with staff or elected officials require a balanced approach to maintain operational integrity and foster a positive work environment.

1. **Maintain Professionalism:** Always respond calmly to disputes, focusing on facts and solutions rather than emotions. This reinforces your role as a neutral and impartial leader.
2. **Document Incidents:** Record specific behaviours, dates, and interactions to ensure you have accurate records for addressing recurring issues or initiating formal actions if needed.
3. **Engage in Mediation:** Utilize conflict resolution techniques and seek neutral third-party mediators if disputes escalate. Clear communication and collaborative problem-solving can often resolve misunderstandings.
4. **Promote Governance Training:** Ensure that elected officials and staff understand their roles and responsibilities through orientation sessions and ongoing professional development. This minimizes role confusion and fosters respect.

CAO Pro Tip: You Are the Steady Hand in the Room

In challenging Council meetings, the CAO must remain calm, ethical, and composed—even when others are not. Your demeanor anchors the room and reflects the tone of the entire organization. Upholding professionalism in public forums enhances organizational credibility and supports long-term trust with the community.

Addressing Harassment and Bullying

Harassment and bullying, whether from elected officials, staff, or external stakeholders, can create a toxic work environment. As a CAO, your leadership is pivotal in establishing a culture of respect and accountability.

1. **Create Robust Policies:** Implement clear anti-harassment policies, including reporting mechanisms and protections for whistleblowers. Ensure all staff and elected officials are aware of these policies.
2. **Respond Promptly:** Address reported incidents immediately by following established protocols. Conduct impartial investigations and apply consequences consistently to deter future misconduct.
3. **Foster a Safe Workplace:** Build a culture where employees feel valued and supported. Regular team-building activities, recognition programs, and transparent communication contribute to a positive work environment.
4. **Encourage Training:** Provide ongoing education on recognizing, reporting, and addressing harassment or bullying. Equip staff and elected officials with tools to manage conflicts constructively.

By integrating these strategies, new CAOs can effectively manage incivility and workplace challenges while fostering a respectful and professional municipal environment. The **Standing Strong Toolkit** provides a comprehensive resource for addressing these complex issues, ensuring that CAOs are well-prepared to lead with integrity and resilience.

CAO Pro Tip: Always take time to debrief after difficult Council meetings to process tensions and restore team morale.

BALANCING MULTIPLE ROLES AND PRIORITIES – CRISIS MANAGEMENT

Crisis management is a fundamental CAO responsibility, demanding foresight, adaptability, and steady leadership. Successful navigation of emergencies depends on proactive planning, decisive execution, and clear communication. Drawing on **CAMA's Municipal Resilience Toolkit: Strategies for Crisis Management**, CAOs can strengthen municipal readiness and resilience.

Stages of Crisis Management.

1. **Prevention & Preparation:** Conduct risk assessments to identify vulnerabilities in infrastructure, services, and community readiness. Implement mitigation strategies—such as emergency preparedness plans, staff training, and interagency collaboration—to build resilience. Formalize mutual aid agreements with neighboring municipalities.
2. **Response:** During a crisis, activate structured incident management systems (e.g. ICS) to coordinate emergency services and ensure public safety. Mobilize resources efficiently, engage stakeholders, and provide transparent, timely updates to maintain public confidence.
3. **Recovery & Evaluation:** After immediate threats subside, focus on restoring services, supporting affected communities, and rebuilding infrastructure. Conduct After-Action Reviews (AARs) to assess response effectiveness and refine future plans.

Crisis Communication

- Develop a Crisis Communication Plan with defined stakeholders, communication channels, and escalation protocols.
- Issue holding statements within 20-60 minutes and follow up with updates every 60-120 minutes as necessary.
- Use a multi-channel approach (e.g. social media, press releases, community briefings) to ensure accessible and transparent communication.
- The Mayor or Chief Elected Official should serve as the primary spokesperson, with all messaging coordinated by the CAO and communications team.

Council's Role in Crisis Management

Council should focus on governance and policy oversight, including:

- Declaring or terminating a State of Local Emergency (SOLE).
- Approving crisis management policies and emergency funding.
- Supporting staff while refraining from direct involvement in operations.

Building Long-Term Resilience

Crisis management extends beyond immediate response. CAOs should lead efforts to:

- Institutionalize continuous learning through AARs.
- Update emergency plans regularly.
- Advocate for sustained investments in preparedness, staff training, and partnerships.

By integrating structured planning, collaborative response efforts, and strategic communication, CAOs can safeguard their communities and uphold public trust. The **CAMA Municipal Resilience Toolkit: Strategies for Crisis Management** offers in-depth templates and resources to support effective crisis leadership.

CAO Pro Tip: Designate a trusted senior manager to oversee internal operations during crises, allowing you to focus on external and Council-facing responsibilities.

NAVIGATING LEADERSHIP TRANSITIONS: A STRATEGIC LEADERSHIP APPROACH

Leadership changes—whether through elections, internal appointments, or restructuring—can shift priorities, alter organizational dynamics, and create uncertainty. Successful CAOs approach these transitions with foresight, reinforcing organizational stability while building trust with both Council and staff.

Navigating Sensitive Transitions into the CAO Role

CAO transitions don't always occur in calm waters. Whether you're stepping into the role after a contentious election, following public controversy, or replacing a well-liked predecessor, you may inherit both visible and unspoken challenges. Organizational morale may be low, trust may need rebuilding, and staff or Council may be hesitant to engage.

In these circumstances, your priority is to listen. Avoid rushing to make changes before fully understanding the emotional temperature of the organization. Acknowledge the transition openly, set a tone of transparency and professionalism, and build relationships one-on-one—especially with key staff and members of Council.

CAO Pro Tip: When entering an organization after a difficult transition, your presence alone may trigger resistance or caution. Build credibility through small wins, consistency, and a respectful acknowledgment of the past without dwelling in it.

Transitioning from Within: Internal Promotions

Moving from a Director or other senior role into the CAO position presents its own set of challenges. You're now managing peers, and you may face assumptions that you're still "one of the team" or overcompensate by distancing yourself.

This transition requires both emotional awareness and intentional boundary-setting. Meet with your former colleagues to redefine working relationships. Demonstrate that while your leadership style hasn't changed, your responsibilities—and accountability—have. If trust and respect were already present, leverage them to create alignment in your new role.

CAO Pro Tip: Don't overcompensate. Internal promotions require grace, not hard edges. Step into the leadership space with confidence—but let your actions earn the authority, not the title alone.

Cultivating Council Relationships

Every Council brings diverse perspectives and unique leadership styles. CAOs must proactively engage with each member, understanding their priorities, communication preferences, and governance approach. Move beyond policy discussions to explore individual motivations and leadership values.

CAO Pro Tip: Early conversations should explore individual Council members' expectations of the CAO role—some may prioritize strategic thinking, others operational responsiveness. Understanding these preferences helps you tailor your approach while still reinforcing appropriate role boundaries.

Strategic dialogue—guided by tools like **CAMA's The Right Questions to Ask Toolkit**—helps CAOs align Council goals with administrative realities. Early conversations should address:

- Aspirations for their term.
- Interests in municipal operations.
- Preferred communication methods.
- Community concerns shaping their perspectives.

This relationship-building fosters a collaborative environment where trust and open dialogue thrive.

Defining Boundaries and Clarifying Roles

Leadership transitions can blur governance boundaries. Reinforce the distinct roles of Council (strategic and policy-focused) and Administration (operational execution). Ensure Council orientation includes:

- A review of governance best practices.
- Discussions about Council's strategic role versus the CAO's administrative mandate.
- Ongoing touchpoints to refresh understanding of roles.

By codifying and clearly communicating these boundaries, CAOs safeguard the organization from role confusion and political-administrative friction.

CAO Pro Tip: Be Friendly, Not Friends

Maintain a warm, respectful rapport with Council and staff—but avoid personal entanglements that may blur professional judgment. Clear boundaries protect your credibility, foster impartiality, and ensure decisions remain rooted in the best interest of the municipality.

Facilitating Unified Decision-Making

Diverse perspectives often lead to competing priorities. The CAO serves as a facilitator, helping Council:

- Identify common ground.
- Prioritize initiatives based on data and municipal capacity.
- Align political objectives with operational feasibility.

Fostering consensus enhances Council effectiveness and positions the CAO as a trusted, objective partner.

CAO Pro Tip: Navigating Conflicting Priorities Requires Strategic Facilitation

When Council members have competing priorities or political agendas, the CAO plays a critical role in fostering common ground. Use data and policy alignment to focus discussions on shared community outcomes. Act as a bridge—not a broker—guiding Council toward realistic goals that reflect both strategic vision and operational capacity.

Stabilizing the Organization

Leadership change can cause apprehension among staff. CAOs act as a steadying force by:

- Maintaining transparent, two-way communication across the organization.
- Pre-emptively addressing misinformation and uncertainty.
- Keeping the focus on the municipality's long-term objectives.

Organizational resilience is built on the CAO's ability to reduce ambiguity and reinforce purpose.

The First 100 Days: Establishing the Foundation

The initial months following a leadership shift are critical. CAOs should set the tone by:

- Scheduling one-on-one meetings with each Council member.
- Delivering concise briefings to orient Council on key municipal priorities.
- Helping Council define realistic, capacity-aligned goals.

Early, proactive engagement sets expectations, strengthens relationships, and creates a stable environment for collaborative governance.

CAO Pro Tip: Your first 100 days with a new Council set the tone. Prioritize relationship-building over process changes.

CAMA Resource: Leverage The Right Questions to Ask Toolkit to facilitate meaningful relationship-building during transitions.

NAVIGATING PUBLIC EXPECTATIONS WITH CONFIDENCE

As CAO, you serve as the bridge between municipal operations and the community, navigating diverse and often competing expectations while protecting the integrity of governance and administration. A cornerstone of success is fostering trust through transparent leadership and clear, proactive communication.

Start by setting realistic expectations. Many residents misunderstand the roles of Council and Administration or the limitations facing municipal operations. Educate the public on the differences between Council's policymaking role and Administration's implementation responsibilities. Clarify how budget constraints, competing priorities, and regulatory frameworks impact municipal decisions. Providing this context early helps build public trust and reduces frustration.

Communication should be multi-faceted and consistent. Engage early to address concerns before they escalate. Use plain language and avoid jargon when sharing information across channels such as social media, municipal websites, newsletters, and public meetings. Two-way dialogue is essential—listen actively to concerns and respond with fact-based, transparent messaging.

While public accessibility is crucial, CAOs must maintain healthy boundaries. Encourage residents to use formal channels like Council meetings or service request portals and redirect operational issues to the appropriate staff. Consistency in messaging, especially in partnership with Council, ensures a unified voice on key issues.

Proactively manage misinformation and controversy. Monitor public sentiment, swiftly address inaccuracies, and stay calm and professional when responding to criticism. Prepare key messages in advance to anticipate and mitigate contentious issues. Strong relationships with local media also play a vital role—provide timely, transparent information and act as a reliable, non-partisan source to help shape accurate public narratives.

Support Council's engagement efforts by equipping them with concise updates, briefing notes, and public-facing materials. Encourage initiatives such as open houses, surveys, and town halls to strengthen connections with the community.

Ultimately, recognize that not every decision will be met with public approval. As CAO, it is essential to stay professional, focus on the municipality's long-term interests, and communicate decisions clearly and confidently.

Finally, safeguard your own well-being. The pressures of public leadership can be demanding, so lean on peer networks, know when to step back from negativity, and set boundaries to maintain a sustainable work-life balance. By leading with transparency and resilience, CAOs can strengthen trust and foster a well-informed and engaged community.

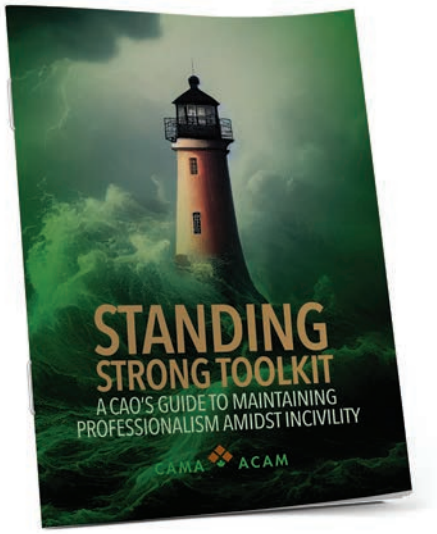
Managing Incivility from the Public: Protecting Elected Officials, Staff, and the Municipality

While managing public expectations is a key part of a CAO's role, it is equally important to address public incivility to protect the well-being of elected officials, staff, and the municipality as a whole. The rise of social media, misinformation, and heightened political tensions has led to an increase in aggressive behaviour, verbal abuse, and even threats toward municipal leaders and employees. As CAO, you must establish clear policies and proactive strategies to ensure that public discourse remains respectful and that incivility does not interfere with municipal operations or personal safety. **Additionally, CAOs and other municipal leaders should remain vigilant for signs of excessive stress among staff who are targeted by online bullying. While staff may present a brave front and claim they are "fine," their behaviour may suggest otherwise. Proactively supporting staff and creating safe spaces for them to express concerns is essential to maintaining a healthy workplace.**

A strong foundation begins with well-defined policies that set clear expectations for respectful interactions between the municipality and the public. These policies should reinforce that while constructive feedback is welcome, harassment, threats, or disruptive behaviour will not be tolerated. Implementing mechanisms to monitor public sentiment, quickly addressing misinformation, and establishing formal reporting and response protocols ensures that incidents of incivility are taken seriously. Additionally, ensuring staff and elected officials receive training on conflict de-escalation and personal safety measures can help mitigate risks in challenging situations.

Public incivility can sometimes escalate to a level where security concerns arise. CAOs should work closely with local law enforcement or security professionals to assess potential risks and implement necessary protections, such as enhanced security presence at contentious meetings, emergency response plans, or personal safety measures for staff and elected officials. Encouraging a culture of professionalism and mutual respect—both within municipal operations and in public interactions—helps reinforce that inappropriate behaviour will not be normalized.

For a deeper dive into strategies for managing incivility, protecting staff and officials, and fostering a culture of respect within your municipality, refer to **CAMA's Standing Strong Toolkit: A CAO's Guide to Maintaining Professionalism Amidst Incivility**.



MAINTAINING ETHICAL STANDARDS

Ethics form the backbone of effective and respected leadership. As a CAO, your commitment to ethical standards reinforces public trust, organizational integrity, and legal accountability.

1. **Act with Transparency** – Ensure that your actions and decisions are guided by principles of openness and honesty. Provide clear explanations for decisions and communicate them effectively to Council, staff, and the community.
2. **Adhere to Governance Protocols** – Follow the policies and procedures outlined in your municipality's governance framework, ensuring fairness, compliance with legal obligations, and accountability in all processes. Upholding the separation of governance and administration prevents conflicts of interest.
3. **Model Integrity** – Your behaviour sets the tone for the entire organization. Lead by example by maintaining professionalism, honoring commitments, and fostering an ethical work culture. Align your actions with established Codes of Conduct, human rights protections, and workplace safety regulations to ensure municipal operations meet both ethical and legal standards.
4. **Address Ethical Breaches** – When ethical concerns arise, act swiftly and transparently to investigate and address the situation. Develop and enforce policies that protect whistleblowers and encourage the reporting of unethical behaviour without fear of retaliation.
5. **Ensure Compliance with Legal & Ethical Standards** – CAOs must be well-versed in their legal obligations, including human rights legislation, occupational health and safety requirements, and policies addressing workplace harassment and discrimination. Ethical leadership involves not only making principled decisions but ensuring that the organization upholds all regulatory requirements.

For a deeper dive into the legal obligations of CAOs, including employer responsibilities, Codes of Conduct, workplace safety, and strategies for addressing incivility, refer to **CAMA's Standing Strong Toolkit: A CAO's Guide to Maintaining Professionalism Amidst Incivility.**

By maintaining high ethical standards and ensuring alignment with legal obligations, CAOs strengthen public confidence, foster a culture of accountability, and create a municipal organization rooted in integrity and trust.

COMMON PITFALLS AND HOW TO AVOID THEM

As a first-time Chief Administrative Officer (CAO), navigating the complexities of municipal leadership can be daunting. While the role offers immense opportunities to make a positive impact, it is also fraught with challenges that can derail your efforts if not approached thoughtfully. By learning from the experiences of others, upholding ethical standards, and adapting to changes in leadership dynamics, you can build a strong foundation for success.

Lessons from First-Time CAOs

Many first-time CAOs encounter similar challenges. Learning from their experiences can help you navigate your early days in the role more effectively.

1. **Overpromising and Under-Delivering** – The pressure to meet high expectations quickly can lead to overcommitment. Set realistic goals, clearly communicate timelines, and focus on achieving quick wins that build credibility while laying the groundwork for long-term success.
2. **Failing to Understand Organizational Culture** – Imposing change too soon without understanding how decisions are made, relationships are built, and traditions are respected can create resistance. Observe, listen, and learn before making major changes.
3. **Neglecting Relationship-Building** – Strong relationships with Council, staff, and community stakeholders are the foundation of effective leadership. Invest time in understanding Council dynamics, fostering trust, and engaging in open communication to prevent misunderstandings.
4. **Blurring Political & Administrative Roles** – Stay within your professional mandate as an administrator and avoid political maneuvering. Clearly define the separation between Council's policymaking role and your administrative responsibilities.
5. **Failing to Communicate Effectively** – Clear, consistent, and timely communication with Council, staff, and the public is critical. Misinformation and assumptions thrive in the absence of strong communication.
6. **Avoiding Difficult Conversations** – Address conflicts, performance issues, and governance challenges head-on. Delaying these discussions can lead to larger problems. Take a solutions-focused approach while maintaining professionalism.
7. **Micromanaging Staff** – Trust and empower your senior leadership team to execute their responsibilities. Micromanagement stifles initiative and slows decision-making.

CAO Pro Tip: Delegation is a leadership strength. Focus on empowering your senior team to lead while you prioritize strategic responsibilities. Avoid slipping into old habits if promoted internally—your role has fundamentally changed.

8. **Ignoring Workplace Culture** – A toxic work environment can derail even the best policies. Foster a culture of respect, inclusivity, and accountability to support a high-performing organization.
9. **Being Unprepared for Crisis Situations** – Whether dealing with natural disasters, infrastructure failures, or reputational crises, proactive planning is key. Regularly review and update emergency preparedness plans to ensure readiness.
10. **Underestimating Public Perception** – Public opinion influences trust and credibility. Manage reputational risks proactively, ensure transparency in decision-making, and engage with the community to build understanding.
11. **Not Documenting Decisions** – Keep accurate records of decisions and rationales to maintain transparency, ensure accountability, and protect institutional memory.
12. **Neglecting Self-Care** – The demands of the CAO role can lead to burnout if personal well-being is overlooked. Prioritize mental and physical health, set boundaries, and find ways to recharge to sustain long-term effectiveness in leadership.
13. **Failing to Designate an Acting CAO** – Designate an Acting CAO early in your tenure to ensure leadership continuity during absences. This supports good governance, improves organizational resilience, and helps reinforce a healthy work-life balance for you and your team.

TOP 10 WAYS TO MANAGE CONFLICT WITH COUNCIL MEMBERS.

1. **Build Trust Early** – Establish strong working relationships based on transparency and respect.
2. **Understand Different Perspectives** – Recognize each Councillor's priorities and concerns.
3. **Communicate Clearly & Regularly** – Provide consistent updates to avoid misinformation or misunderstandings.
4. **Remain Professional & Neutral** – Avoid taking sides in political disputes.
5. **Set Boundaries** – Ensure Council members understand governance roles versus operational responsibilities.
6. **Address Issues Privately** – When conflicts arise, attempt resolution through one-on-one discussions before escalating.
7. **Use Mediation When Needed** – Engage a neutral third party if disputes become unmanageable.
8. **Document Everything** – Maintain records of discussions and decisions to avoid misrepresentation.
9. **Manage Meetings Effectively** – Enforce rules of order to keep discussions productive.
10. **Stay Solution-Focused** – Redirect conversations from personal conflicts to constructive problem-solving.

As a first-time CAO, you are stepping into a position of profound influence over your municipality's success and stability. This role demands courage, adaptability, and strategic foresight as you guide your community through evolving governance landscapes, public pressures, and internal challenges.

By leveraging trusted resources like **CAMA's Toolkits** and focusing on ethical, transparent leadership, you will not only withstand adversity—you will shape a resilient and effective municipal organization.

Trust your instincts, invest in your personal leadership development, and remember that you are never alone. Peer networks, governance frameworks, and mentorship will be key allies on your journey.

CAO Pro Tip: Always debrief after conflict situations to reflect on lessons learned and refine your approach.

Leadership Mindset

- Lead with calm amid uncertainty.
- Be transparent, even when conversations are tough.
- Build bridges – not walls – with your Council, staff, and community.
- You are not just a manager; you are the steward of the municipality's present and future.

SMALL BUT MIGHTY: THRIVING AS A CAO IN A SMALL MUNICIPALITY

UNIQUE CHALLENGES OF SMALL MUNICIPALITIES

Being a Chief Administrative Officer (CAO) in a small municipality is a unique and multifaceted leadership role. Unlike larger municipalities with more specialized staff and robust resources, small municipalities demand that CAOs manage a broader scope of responsibilities with fewer resources, all while navigating the dynamics of close-knit communities. This chapter provides strategies and practical tools to help CAOs lead effectively under these distinct circumstances.

Wearing Many Hats: The Multifaceted Role of a Small-Town CAO

In small municipalities, the CAO often takes on a wide array of roles, from high-level strategic planning to operational tasks such as grant writing, human resources management, and community engagement. This diversity can be both rewarding and overwhelming.

- **Embrace Versatility:** Be prepared to handle tasks outside the traditional CAO role, from IT troubleshooting to media relations.
- **Set Priorities:** Develop a clear understanding of your core responsibilities and align your time with the municipality's strategic priorities. Delegate tasks where possible, even within a small team.
- **Expand Your Skill Set:** Invest in training or professional development to expand your capabilities in areas like finance, human resources, and public relations. This helps you confidently manage diverse responsibilities.

Doing More with Less: Managing High Expectations with Limited Resources

Small municipalities often face the challenge of delivering high-quality services despite tight budgets, limited staffing, and aging infrastructure. While expectations from residents and Council remain high, creative leadership and strategic resource management can help bridge the gap.

- **Transparent Communication:** Clearly articulate resource limitations to Council and residents. Transparency about financial and staffing constraints helps manage expectations and fosters informed decision-making.
- **Leverage Partnerships:** Collaborate with neighboring municipalities, regional organizations, or non-profits to share resources and expertise. Shared service agreements can provide access to specialized skills without increasing staffing levels.
- **Prioritize Spending:** Focus on essential services and projects that align with the municipality's strategic goals. Data-driven decision-making can help justify budget allocations to Council and the community. Consider holding a Service Delivery Review with Council to identify priority services and clarify expected service standards—ensuring these expectations align with the organization's capacity to deliver.
- **Pursue External Funding:** Seek grants and funding opportunities from provincial, federal, and private sources. Building relationships with funding agencies and investing time in well-crafted proposals can unlock additional resources.
- **Engage the Community:** Involve residents in setting priorities and exploring cost-effective solutions. Crowdsourcing ideas, leveraging volunteer programs, or collaborating with local businesses can enhance service delivery without straining the budget.
- **Adopt Innovative Practices:** Implement technology and automation to improve efficiency. Simple changes, such as streamlining administrative processes or digitizing services, can free up resources for other priorities.

By adopting innovative approaches and fostering collaboration, CAOs can stretch limited resources to maximize community impact.

Human Capital: Recruitment, Retention, and Capacity Building

Staffing shortages are a common reality in small municipalities. Building a resilient workforce requires both internal development and external partnerships. A flexible, values-driven approach to hiring and retention can make a significant difference.

Developing Internal Talent

- Identify leadership potential in your current staff.
- Offer mentorship, professional development, and cross-training.
- Use acting or interim positions as growth opportunities.

Creative Recruitment & Retention

- Promote small-town advantages such as meaningful impact, a close-knit work environment, and better work-life balance.
- Offer flexible arrangements (e.g. hybrid work, compressed workweeks, job-sharing).
- Highlight proven recruitment and retention strategies, such as referral bonuses, housing or relocation assistance, and community-based hiring that taps into local knowledge and fosters civic pride.
- Partner with educational institutions for student placements, internships, or co-op opportunities.
- In smaller municipalities, prioritize attitude, adaptability, and team fit over formal credentials where appropriate, especially for roles that allow for on-the-job training and mentorship.

Recruitment for Hard-to-Fill Roles

- Utilize regional networks, professional associations, and targeted job boards to widen your candidate pool.
- Consider joint recruitment efforts or shared roles with neighbouring municipalities.
- Explore incentives such as signing bonuses or phased retirement options to attract and retain experienced professionals.

Succession Planning & Knowledge Transfer

- Establish a clear succession planning framework.
- Document key processes and procedures to support continuity.
- Foster mentorship and job shadowing to pass along institutional knowledge and build future leaders.

Building Team Capacity

- Ensure cross-training to build redundancy for critical tasks.
- Create a supportive team environment that encourages collaboration and regular knowledge-sharing.
- Supplement internal capacity with consultants, contractors or part-time professionals for specialized or temporary projects.

A proactive approach to talent management – grounded in flexibility, creativity, and a strong workplace culture – can help small municipalities thrive, even with limited resources.

Navigating Community Dynamics and Public Expectations

Serving as a CAO in a small municipality means you are not just an administrator—you are a visible and integral part of the community. While this fosters stronger connections and engagement, it also brings unique challenges in maintaining professional boundaries, managing expectations, and handling public scrutiny.

Balancing accessibility, professionalism, and transparency is key to building trust while ensuring that municipal operations remain fair, effective, and sustainable.

In addition to the complexities of small-town leadership, CAOs in small municipalities are still responsible for meeting the same legislative, regulatory, and reporting requirements as their counterparts in larger organizations. With fewer staff and resources, this adds pressure and requires creative approaches to workload management and service delivery.

CAO Pro Tip: Safeguard Capacity and Set Limits Early

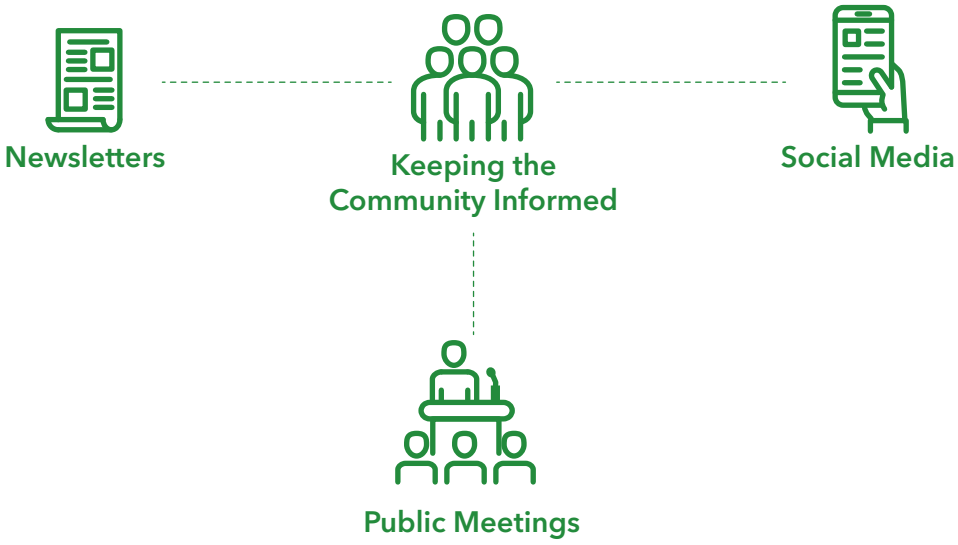
It's essential to protect your team's capacity by being realistic about the time and resources needed to implement Council directives. Be transparent with Council about potential impacts on staff workload, timelines, and trade-offs. Proactively framing these discussions helps prevent burnout, sets achievable expectations, and reinforces your role as a steward of organizational sustainability.

Small-town CAOs also navigate unique challenges such as amalgamations, jurisdictional overlaps, or shared governance arrangements. These circumstances can heighten complexity, political sensitivities, and public emotion—requiring strong leadership and diplomacy.

In small communities, CAOs are highly visible figures, which presents both the opportunity to build trust and the challenge of managing public expectations and personal boundaries. A key responsibility is educating the community on the distinct roles within local government, particularly differentiating between Council's policy-making responsibilities and Administration's role in implementation. It is also essential to help residents understand the municipality's financial constraints and the limits of its jurisdiction.

CAOs must walk a fine line–being approachable and community-focused, while also maintaining their authority as the administrative head of the organization. In tight-knit environments, this can sometimes be difficult, especially when personal and professional lines blur. In small communities, it is also important to recognize and understand the **informal power structures** that may influence decision-making and public sentiment. These can include long-standing community associations, business leaders, or individuals with strong local ties or social influence. While these actors may not hold formal authority, they often play a role in shaping public opinion and Council priorities. Navigating these dynamics with awareness and diplomacy—while upholding fairness and transparency—can support stronger relationships and help pre-empt potential conflicts.

Proactive communication is vital in this environment. Regular updates through newsletters, social media, and public meetings can help keep the community informed. Using plain language minimizes misunderstandings, while fostering two-way communication through feedback mechanisms builds stronger connections with residents.



At the same time, setting boundaries while remaining accessible is crucial. Encouraging the use of formal communication channels, such as service requests or Council meetings, helps maintain professionalism and structure. Operational complaints should be redirected to appropriate staff, allowing the CAO to focus on leadership and strategy. Collaboration with Council is necessary to ensure consistent public messaging.

Managing misinformation and addressing controversy is another key aspect. Monitoring social media and public sentiment allows the CAO to address rumors before they escalate. Responding calmly and factually to criticism helps maintain credibility, and having prepared key messages for contentious issues ensures a steady approach.

Supporting Council's public engagement efforts is also a priority. This includes providing regular briefings, preparing media notes, and assisting in the facilitation of public forums such as open houses and town halls. Finally, it is important to accept that not all decisions will be well-received. Focusing on long-term community goals, rather than seeking short-term approval, ensures that leadership remains grounded in the broader interests of the community.

In smaller municipalities, innovation is often born out of necessity. CAOs should feel empowered to try new approaches–and normalize reasonable failure as part of growth and adaptation. Building a culture that supports learning from missteps helps create a more resilient, forward-thinking organization.

Managing public expectations in a small community requires balancing accessibility with professionalism, transparency with confidentiality, and community engagement with municipal governance. By setting clear expectations, maintaining open communication, and fostering trust through fairness and consistency, CAOs can navigate the unique challenges of small-town leadership while making a meaningful impact on their community.

CAO Pro Tip: Read the Room–Informal Influence Matters

In small communities, formal titles don't always reflect who holds influence. Pay attention to informal power brokers—long-standing residents, business leaders, or association heads—who may shape public opinion behind the scenes. Build respectful relationships, stay politically neutral, and communicate transparently to navigate these dynamics without compromising your role as an impartial public servant.

Case Study: Adapting to a Rural vs. Urban Municipality

After serving as CAO in a large urban center, Lisa accepted a leadership role in a small rural municipality. Accustomed to a structured administration with specialized departments, she quickly realized the hands-on, community-focused nature of small-town governance required a shift in approach.

Key Challenges & Adaptations:

- **Limited Resources:** Without large teams, Lisa had to become more directly involved in operations and decision-making.
- **Close-Knit Community:** Residents expected direct access to the CAO, requiring more informal engagement.
- **Different Council Expectations:** While urban governance was data-driven, rural leaders valued relationship-building and practical solutions.

Lessons Learned:

- **Adaptability is key**—different municipalities require different leadership styles.
- **Engagement matters**—being present and accessible builds trust in smaller communities.
- **Resourcefulness is essential**—rural municipalities require creative problem-solving with fewer resources.

Lisa successfully transitioned by embracing a more hands-on leadership style, fostering strong relationships, and aligning urban expertise with rural realities.

LEADING IN THE NORTH: THE REALITIES OF SAOS IN REMOTE AND NORTHERN COMMUNITIES

Across Canada, the senior administrative official may hold different titles—CAO, Town Manager, Administrator—but in the North and many remote communities, the title is often **SAO: Senior Administrative Officer.** While the core responsibilities mirror those of a CAO—providing administrative leadership, supporting good governance, and delivering services—the operating context is entirely unique.

In northern and remote regions, SAOs often serve in isolated, under-resourced, and culturally rich environments. Staffing shortages are a constant challenge—some municipalities may face three vacancies and only one applicant, or none. Recruiting and retaining skilled professionals is often complicated by a lack of housing, limited amenities, or difficulty in relocating families.

SAOs frequently manage multiple portfolios out of necessity—acting simultaneously as finance officer, human resources manager, planner, and communications lead. Strategic planning, policy implementation, and even basic service delivery must be adapted to the local reality, often without access to the consultants, external support, or administrative depth available in more urbanized areas.

Infrastructure and housing are critical concerns, and Council expectations must be carefully managed. An SAO may need to explain, diplomatically but firmly, why a housing strategy cannot be developed overnight—or why project delays are unavoidable due to supply chain constraints, seasonal logistics, or limited staff capacity.

Working in small and remote communities also means living among the people you serve. This brings great reward—tight community bonds, opportunities for real impact—but also significant complexity. Personal and professional boundaries often blur, and leaders must navigate political dynamics, long-standing histories, and overlapping spheres of influence with diplomacy and care.

Furthermore, relationships with Indigenous governments and communities are foundational to northern governance. SAOs are often called upon to support intergovernmental collaboration, uphold Indigenous rights and protocols, and foster trust through meaningful and respectful engagement.

SAO Pro Tip: In the North, leadership is about flexibility and credibility. Progress looks different here—set realistic expectations, be transparent about capacity, and focus on relationships as much as results.

CAMA recognizes that northern municipal leadership is deeply contextual.

PROTECTING YOUR OWN WELL-BEING AS A SMALL-TOWN CAO

Protecting your well-being as a small-town CAO is critical to sustaining your leadership effectiveness. The personal and highly visible nature of working in a close-knit community can bring heightened emotional demands and stress. To maintain resilience, it is important to lean on external networks and peer supports, such as CAMA or trusted professional mentors, who can offer perspective and advice. Prioritizing work-life balance is also essential—guard your downtime and set firm boundaries to avoid constant accessibility. Be proactive in recognizing early signs of burnout and don't hesitate to seek support when needed. Finally, learn to step back from unproductive debates and redirect your energy toward constructive engagement, focusing on initiatives and conversations that contribute positively to both your well-being and your organization's success.

MANAGING INCIVILITY AND GOVERNANCE CHALLENGES IN SMALLER COMMUNITIES

In smaller communities where personal relationships and family connections often influence Council dynamics, maintaining professional boundaries can be challenging. These personal connections may lead to complications in governance and staff interactions, making it essential for the Chief Administrative Officer (CAO) to navigate these dynamics carefully. This section provides strategies for managing these challenges and outlines key etiquette guidelines to ensure respectful interactions between Council members and staff.

Addressing Personal Relationships and Professional Boundaries

Understanding the Dynamics

In smaller communities, personal relationships can greatly influence Council dynamics. Family ties and long-standing friendships among Council members and staff often affect decision-making and interactions. These relationships can blur the lines between personal and professional boundaries, potentially leading to conflicts of interest and unfair treatment in governance.

Strategies for Managing Personal Dynamics

- **Clarify Roles and Responsibilities:** Clearly define the roles and responsibilities of Council members and staff. Ensure that everyone understands the boundaries between personal relationships and official duties. Emphasize the importance of separating personal biases from professional responsibilities.
- **Foster Open Communication:** Promote open and transparent communication channels between the CAO, Council members, and staff. Regularly discuss expectations and address any concerns related to personal relationships affecting professional interactions.
- **Implement Structured Processes:** Develop and enforce structured processes for decision-making and conflict resolution. This helps ensure that personal relationships do not unduly influence governance or staff management.
- **Provide Training and Awareness:** Offer training sessions for Council members and staff on maintaining professional boundaries and handling personal relationships within the governance framework. This training should cover topics such as conflict of interest and respectful communication.
- **Encourage Reporting Mechanisms:** Establish clear mechanisms for reporting any concerns related to personal relationships influencing professional conduct. Ensure that staff feel safe and supported in raising issues without fear of retaliation.

Council-Staff Etiquette Guidelines: Maintaining Professional Boundaries

Navigating personal relationships while maintaining professional decorum is particularly challenging in smaller communities. Clear expectations and consistent etiquette are essential.

Council to Staff

- **Professional Communication:** Council members should address staff with professionalism and respect. Use formal titles and avoid overly familiar language.
- **Respectful Interaction:** Acknowledge staff expertise and contributions without making personal comments based on friendships or community ties.
- **Clear Expectations:** Communicate feedback and direction in a professional, constructive manner. Avoid ambiguity or informal channels.
- **Respecting Boundaries:** Follow protocols for interacting with staff, as defined by the CAO. For example, some CAOs require all requests from Council to go through their office, rather than directly to staff.

Staff to Council

- **Formal Address:** Refer to Council members using appropriate titles (e.g. Mayor, Councillor) to maintain formality and professionalism.
- **Respectful Communication:** Be factual and constructive. Avoid expressing personal opinions or emotional responses.
- **Follow Proper Channels:** Communicate through the processes set by the CAO, ensuring information flows consistently.
- **Acknowledge Authority:** Respect the governance role of Council members while maintaining clear professional boundaries.
- **Consistency in Information:** Ensure all members of Council receive the same information at the same time to prevent misperceptions or favoritism.
- **Avoid Perceptions of Favoritism:** The CAO and staff must be careful not to unintentionally show preference to certain Councillors. Balanced communication builds trust and unity.

By implementing structured communication processes and following clear etiquette expectations, CAOs can help ensure respectful, professional relationships that support effective governance.

GROWTH & SUSTAINABILITY: BUILDING A LONG-TERM CAO CAREER

ONGOING PROFESSIONAL GROWTH, MENTORSHIP & PEER SUPPORT

To thrive as a CAO and build a sustainable leadership career, you must prioritize ongoing professional development, mentorship, and peer engagement. The demands of the CAO role are wide-ranging and complex—requiring you to lead through uncertainty, balance political and operational priorities, and deliver meaningful results. No CAO should go it alone.

Continuous Learning and Skill Development

Whether you come from a background in planning, engineering, law, finance, or recreation, the breadth of CAO responsibilities—from governance and financial management to human resources and community engagement—requires continuous development.

The role also offers unparalleled opportunities to grow as a leader and broaden your expertise. Programs such as **CAMA's Executive Leadership Program** and Provincial/Territorial Association workshops equip you with practical tools and leadership frameworks to meet evolving challenges. Continuous development is critical for both first-time CAOs and seasoned professionals to stay ahead of trends like technological innovation, climate resilience, and evolving governance models.

Core Competencies: Successful CAOs cultivate political acumen, strategic leadership, and organizational resilience to guide their municipalities through complexity.

Building Mentorship and Coaching Relationships

Mentorship and executive coaching are invaluable assets to a CAO's leadership journey. A seasoned mentor—typically a senior CAO or municipal leader—can offer insights, lessons learned, and confidence-building support based on direct experience.

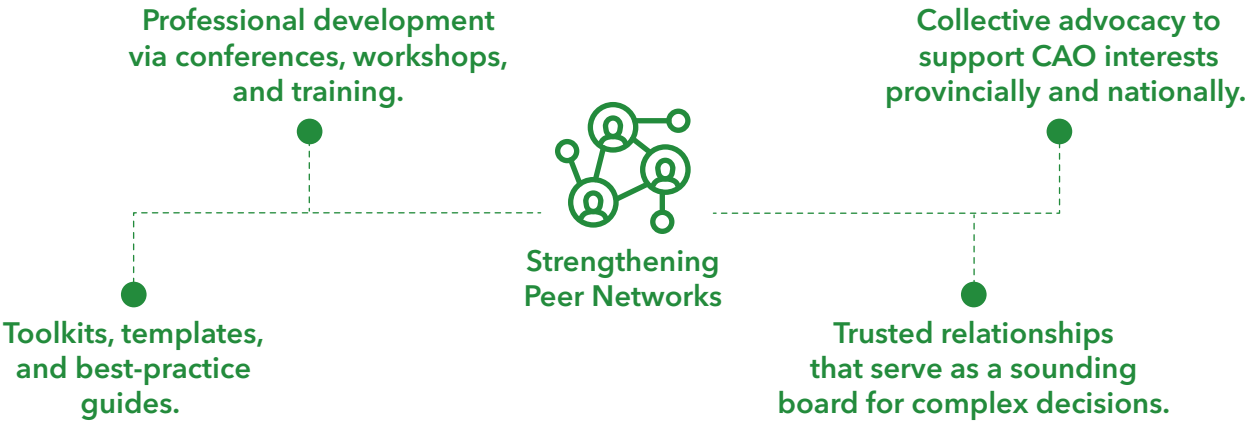
Executive coaching complements mentorship by delivering structured, personalized guidance that sharpens communication skills, enhances decision-making, and strengthens resilience.

CAO Pro Tip: Engaging a mentor or coach early in your tenure accelerates growth and can help navigate difficult governance dynamics.

Strengthening Peer Networks and Reducing Isolation

CAO leadership can often feel isolating. Actively engaging in professional networks fosters a sense of community and collaboration. Through CAMA and your Provincial/Territorial Association, you gain access to:

- Toolkits, templates, and best-practice guides.
- Professional development via conferences, workshops, and training.
- Collective advocacy to support CAO interests provincially and nationally.
- Trusted relationships that serve as a sounding board for complex decisions.



Conferences and Collaborative Learning

Participating in national and regional conferences re-energizes CAOs with fresh perspectives, actionable strategies, and peer support. Sessions address timely topics ranging from Council dynamics and resource challenges to innovation and human resource leadership. Shared experiences and candid conversations at these events help reduce the isolation many senior leaders experience while offering tangible solutions to common challenges.

Giving Back

As CAOs grow in experience, they are encouraged to mentor others, helping strengthen the next generation of leaders and fostering a sustainable leadership culture across the profession.

A Meaningful Journey

Being a CAO is both demanding and deeply fulfilling. By prioritizing professional development, cultivating networks, and giving back through mentorship, you ensure your leadership leaves a lasting positive impact on your municipality—and the profession.

LEADING CHANGE & INNOVATION: BUILDING A RESILIENT AND FUTURE-READY MUNICIPALITY

Adapting to change and leading innovation are core competencies for Chief Administrative Officers (CAOs) operating in a dynamic municipal landscape. Municipalities today face rapid societal shifts, technological advancements, and political complexities. As a CAO, your ability to lead organizational change and foster a culture of continuous improvement and innovation is critical to ensuring that your municipality remains resilient, forward-thinking, and capable of meeting evolving community needs.

CAO Pro Tip: The Power of Continuous Improvement

A high-performing municipality is one that not only meets current expectations but continuously strives to improve. Continuous improvement drives innovation, enhances efficiency, and promotes employee engagement. By fostering a culture where staff are empowered to contribute ideas and refine processes, CAOs can strengthen organizational capacity and build a collaborative, high-performing workplace.

Practical Tip: Leverage performance measurement tools, Lean principles, and regular strategic reviews to ensure your municipality remains agile and responsive.

Leading Organizational Change

Organizational change is often necessary to realign operations with shifting priorities and improve municipal services. CAOs play a critical role in leading transformation while maintaining trust and stability.

Key Steps in Leading Organizational Change	Description & Tips
Understand the Need for Change	Conduct a thorough assessment of your organization to identify inefficiencies, outdated practices, or misaligned priorities. Engage stakeholders—Council, staff, and residents—for a 360-degree view. **Tip:** Use a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) to evaluate your municipality's current state. A RASCI analysis is also helpful (who is Responsible, Approves, Supports, Consults, Informed).
Develop a Clear Vision and Strategy	Define what success looks like and create a strategic roadmap to guide implementation. **Tip:** Communicate the vision consistently through staff meetings, newsletters, and informal conversations.
Build a Coalition of Support	Identify champions within your organization and community to advocate for the change initiative and help navigate resistance. **Tip:** Engage department heads and Council early to gain buy-in and credibility.
Manage Resistance	Address concerns openly and transparently. Create forums for staff feedback to reduce fear and foster trust. **Tip:** Hold listening sessions to encourage staff involvement and input.
Monitor and Celebrate Progress	Track key milestones, recognize contributions, and adapt your strategy as needed. **Tip:** Publicly celebrate wins through awards, newsletters, or social media to maintain momentum.

Embracing Innovation in Local Government

Innovation is vital for optimizing municipal services, enhancing community engagement, and ensuring operational excellence. Fostering a culture of innovation equips your municipality to seize new opportunities and navigate uncertainty.

Innovation Strategy	Description & Tips
Create an Innovation-Friendly Culture	Encourage creative thinking and experimentation. Embrace learning from both successes and failures. **Tip:** Establish an internal innovation fund to support staff-led pilot projects aligned with municipal goals.
Leverage Technology to Drive Innovation	Technology is transforming how municipalities operate, and even smaller communities can benefit from accessible digital solutions. **Key Technology Opportunities:** • **Digital Governance Tools:** Implement Council meeting platforms, agenda management systems, and digital records management. • **AI and Data Analytics:** Use predictive analytics for decision-making, financial forecasting, and service optimization. • **Public Engagement Platforms:** Enhance transparency and participation through social media, virtual town halls, and online surveys. • **Cybersecurity:** Prioritize data protection, cyber resilience, and compliance with privacy legislation. **CAO Pro Tip: Prioritize Cybersecurity Like a Core Service.** Even small municipalities are targets. Ask your IT team or contractor for a plain-language briefing on your current vulnerabilities, policies, and response plans. Then schedule regular security updates and simulations. Cybersecurity isn't just an IT issue—it's an organizational risk and reputational concern. • **Smart City Solutions:** Explore GIS mapping, automated service requests, and AI-powered services to improve operational efficiency. **Tip:** Start with small-scale, high-impact projects, like upgrading your website or digitizing work order systems.

Innovation Strategy	Description & Tips
Engage Residents in Co-Creation	Involving residents in the innovation process strengthens trust and unlocks creative solutions. **Tip:** Host innovation labs or design-thinking workshops with staff, Council, and community members to tackle specific municipal challenges.
Collaborate Across Sectors	Partnering with other municipalities, non-profits, and private organizations brings fresh perspectives, shared resources, and access to expertise. **Tip:** Join regional innovation networks or association-driven collaborative projects.
Measure and Share Results	Evaluate the outcomes of innovation initiatives and use data to inform future decisions. **Tip:** Share results through dashboards or visual reports to demonstrate impact to Council, staff, and the public.

Leading a Resilient and Future-Ready Municipality

Change and innovation are constants in local government. Your leadership in driving transformation and embracing new ideas ensures your municipality is equipped to overcome challenges and leverage opportunities. By building a culture rooted in openness, collaboration, and creativity—and by strategically applying technology—you position your municipality as a resilient and forward-thinking leader in public service.

Case Study: Fostering Innovation in a Small Municipality

Ken became CAO of a rural municipality with limited financial and human resources. Staff morale was low, and outdated processes slowed service delivery.

Ken created an internal innovation committee and introduced an "innovation fund" with a modest budget to encourage small, staff-led projects. The first project was a low-cost online permit application system proposed by the planning department. Ken also piloted a digital work order system to improve operational efficiency.

Within six months, the online permitting system reduced wait times by 40%, and internal processes became more streamlined. The success generated enthusiasm among staff, leading to additional proposals and improved morale.

Key Takeaway: Innovation doesn't require a large budget. Empowering staff to lead small-scale initiatives fosters engagement and drives meaningful improvements.

PERSONAL RESILIENCE & WELLNESS AS A CAO

Managing stress and maintaining wellness is essential to sustaining your leadership as a Chief Administrative Officer (CAO). The demands of the role—marked by high-pressure situations, political complexity, and long hours—require a strong focus on personal well-being.

Proactively managing stress begins with effective time management. Prioritize critical tasks and utilize scheduling tools to keep your workload organized. Empower your senior leadership team to take on operational responsibilities so you can concentrate on strategic leadership. When faced with challenges, take time for mindful reflection before making decisions under pressure.

CAO Pro Tip: Normalize the "Hero to Zero" Cycle

In municipal leadership, one day you may be the "community hero" praised for your leadership—and the next, a lightning rod for public criticism over decisions you believed were right. This fluctuation is normal. Understanding that leadership popularity can be cyclical helps you stay grounded, resilient, and focused on long-term outcomes rather than short-term approval.

Work-Life Balance for Long-Term Effectiveness

To prevent burnout, establish and protect a healthy work-life balance. Define clear work hours and respect your personal time. Pursue hobbies and interests outside of work to bring fulfillment and recharge your energy. Integrating mindfulness techniques such as meditation and deep breathing can help you reduce stress and improve focus.

Setting Limits and Prioritizing Well-Being

Overextension is a common challenge for CAOs. Safeguard your leadership capacity by communicating your limits openly with Council and staff. Say no to non-essential tasks that fall outside your core priorities. Schedule and protect your personal time—including vacations—as you would any other critical commitment.

Building Resilience and Mental Toughness

Resilience is key to navigating the uncertainties and pressures of municipal leadership. Build a strong support network of trusted peers, mentors, and professional associations like CAMA. View setbacks as opportunities for learning and growth and take time to celebrate both personal and team achievements to stay motivated.

Creating a Personal Wellness Plan

A comprehensive wellness plan can help sustain your leadership longevity. Prioritize your physical health through regular exercise, balanced nutrition, and adequate rest. Support your emotional health by engaging with peer groups, seeking counselling, or building mentorship relationships. Continue your professional growth through conferences and leadership training, and ensure you schedule regular breaks and vacations to recharge.

Aligning with What Matters Most

Focus your energy on initiatives that reflect both your personal values and your municipality's priorities. Direct your efforts toward actions and decisions that create meaningful, long-term impact. Foster a positive workplace culture by consistently recognizing and celebrating your team's contributions.

Leading by Example

By committing to self-care and demonstrating resilience, CAOs model sustainable leadership for their organizations. A composed, well-balanced leader creates an environment that supports success, collaboration, and the well-being of others.

When Leadership Feels Isolating

The executive nature of the CAO role can feel isolating at times, especially during difficult governance situations. Combat this by building and nurturing your support system. Engage with peer networks such as CAMA forums or Mastermind groups, seek mentorship or executive coaching for leadership guidance, and strengthen internal relationships with your senior leadership team to ensure you are not navigating challenges alone.

Case Study: Late Nights and Culture Shifts

Karen, a dedicated CAO of a mid-sized municipality, prided herself on her work ethic. Often, she was the last to leave the office, working late into the night to stay on top of Council demands, staff reports, and community priorities. While her commitment was unquestionable, Karen's habits unintentionally set a tone across the organization. Her staff began mirroring her long hours, fearing that leaving "on time" would be seen as lacking dedication.

Over time, Karen noticed increased absenteeism, declining morale, and quiet frustration within her senior leadership team. A trusted colleague pointed out that Karen's behaviour might be sending an unspoken message: that balance was not valued.

Recognizing this, Karen took deliberate steps to recalibrate. She began prioritizing self-care by leaving at a reasonable hour and encouraged her team to do the same. She openly shared the importance of work-life balance at staff meetings and took her vacation time without hesitation.

Within a few months, the shift was noticeable. Staff felt empowered to set boundaries, productivity improved, and the leadership team grew more engaged and energized.

Karen's experience reinforced an essential truth: CAOs set the tone from the top. By modeling balanced, sustainable leadership, they create an environment where others feel safe to prioritize their well-being without sacrificing performance.

Staying Resilient

Top 10 Ways to Prevent Burnout and Thrive as a CAO

- Set and enforce work-life boundaries.
- Take time off when needed—don't let vacation days go unused.
- Seek peer support and mentorship.
- Develop a stress management routine (exercise, mindfulness, hobbies).
- Delegate tasks and trust your team.
- Establish a strong support network outside of work.
- Focus on long-term sustainability rather than immediate perfection.
- Advocate for fair compensation and reasonable workload expectations.
- Learn to say no to non-essential commitments.
- Regularly reflect on and celebrate achievements.

When the Job Takes a Toll & Burnout Signs

The role of a Chief Administrative Officer (CAO) is demanding, and there may come a time when the pressures of the position start to feel insurmountable. Whether it's due to conflict, burnout, or a sense of diminished purpose, knowing how to recalibrate your approach or recognize when it's time for a change is vital for your well-being and the municipality's success. This section provides actionable advice for regaining balance, addressing challenges, and planning a meaningful legacy.

Signs It's Catching Up With You

Burnout can creep up gradually, especially in high-pressure leadership roles like that of a CAO. Recognizing the early warning signs is key to taking proactive steps before it impacts your effectiveness and well-being. Below are common indicators that burnout may be taking hold.

Top 10 Signs of Burnout for a CAO

- Constant exhaustion, even after rest.
- Decreased motivation and enthusiasm for the job.
- Increased irritability or emotional outbursts.
- Difficulty concentrating or making decisions.
- Feeling overwhelmed by even minor challenges.
- Loss of interest in professional development or networking.
- Avoidance of difficult conversations or conflicts.
- Physical symptoms (headaches, insomnia, stomach issues).
- Neglecting personal relationships due to work stress.
- Persistent feeling of being undervalued or unappreciated.

How to Reset When Things Derail

When the job becomes overwhelming, the first step is identifying and addressing the root causes of your stress. This may include interpersonal conflicts, excessive workloads, or lack of clarity in roles and responsibilities. Strategies to regain control include:

1. **Conduct a Personal and Professional Audit:**

   Reflect on your workload, relationships, and stress triggers. Are you taking on too much? Are there unresolved issues with Council or staff? Document your findings to identify areas for improvement.

2. **Reprioritize and Delegate:**

   Focus on high-impact tasks and delegate operational responsibilities to senior staff. This not only reduces your workload but empowers your team.

3. **Engage in Transparent Communication:**

   Meet with Council and staff to reset expectations and clarify goals. Open dialogue often resolves misunderstandings and realigns priorities.

4. **Lean on Your Network:**

   Reach out to peers, mentors, or professional associations like CAMA for advice, support, and resources tailored to your challenges.

CAO Pro Tip: Decisions Will Be Scrutinized–Plan Accordingly

Assume every decision you make will be scrutinized or made public—especially in times of crisis or conflict. This mindset encourages clarity, accountability, and well-documented processes. When unsure, buy time. It's always better to pause and reflect than to respond prematurely under pressure.

WHEN WORK FEELS LIKE A BATTLEFIELD

Rebuilding Trust and Workplace Respect in a Fractured Workplace

When Work Feels Like War

Persistent tension, incivility, or hostility in the workplace can make your role feel adversarial. If this happens, take the following steps to protect yourself and foster a healthier environment:

- **Document Everything:** Maintain a log of incidents, including dates, details, and outcomes. This record can provide clarity, and support should you need to escalate concerns.
- **Establish Clear Boundaries:** Assertively reinforce professional standards with elected officials, staff, and external stakeholders. Address incivility directly but diplomatically.
- **Leverage External Support:** Engage legal counsel or human resources when necessary to protect your position and uphold organizational integrity. Professional networks can also provide guidance and emotional support.
- **Focus on the Bigger Picture:** Remember that your work benefits the entire community. Keep this perspective front and center as you navigate challenging dynamics.

Trust and respect are cornerstones of a functional workplace, and when they are eroded, both your effectiveness and the municipality's progress are at risk. Rebuilding them requires intentional effort:

- **Acknowledge the Problem:** Address tensions openly and constructively. Invite stakeholders to share their concerns and work collaboratively toward solutions.
- **Model Integrity and Fairness:** Consistent, ethical behaviour builds credibility. Be transparent in your decisions and demonstrate fairness in all interactions.
- **Focus on Shared Goals:** Redirect attention toward the municipality's priorities, emphasizing the collective good over individual differences.
- **Celebrate Small Wins:** Publicly recognize achievements, no matter how small, to rebuild morale and foster a positive atmosphere.

EXIT STRATEGY: RECOGNIZING WHEN IT'S TIME TO TRANSITION

Navigating Council Tensions and Preparing for Transition

As a CAO, it's crucial to be vigilant and proactive when you sense that something is amiss with the Council. Here are some warning signs to watch for:

- **Council Meetings Without You:** If Council is holding meetings without your knowledge or presence, this could indicate a lack of trust or confidence.
- **Disagreement with Mayor and/or Council:** Persistent disagreements, especially if they are public, can signal deeper issues.
- **Disputes with Prominent Business Owners or Ratepayers Groups:** Conflicts with influential community members can exacerbate tensions with Council.
- **Volatile Community Issues:** If a contentious community issue is being associated with you, it can become a flashpoint.
- **Local Media Scrutiny:** Increased media attention, whether they're positioning themselves as allies or adversaries, can be a red flag.

When you notice these signs, taking proactive steps is essential to mitigate potential transitions and protect your professional standing. Here are some strategies to consider:

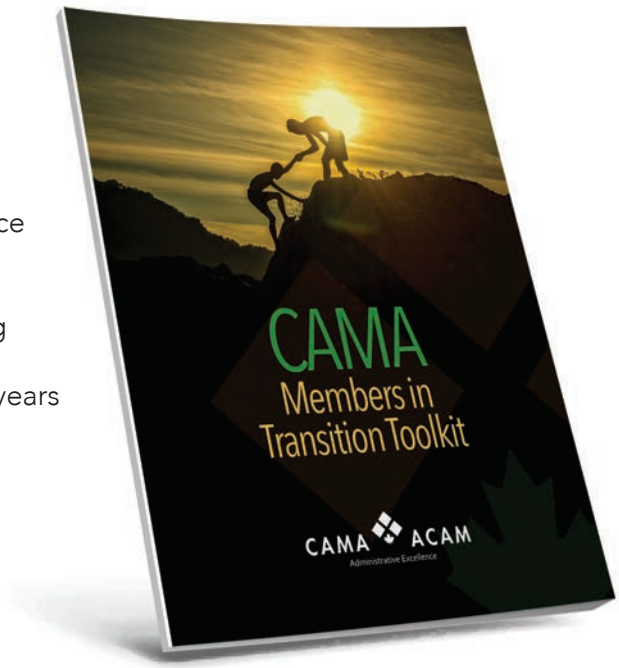
1. **Open Communication:** Attempt to address any issues directly with the Council. Open, honest dialogue can sometimes resolve misunderstandings and rebuild trust.
2. **Seek Mediation:** Engaging a neutral third party to mediate discussions can help facilitate a resolution and demonstrate your commitment to a positive working relationship.
3. **Leverage Support Networks:** Utilize resources such as mentors, peers, or professional organizations to gain perspective and advice.
4. **Document Everything:** Keep detailed records of your interactions, decisions, and any incidents that could be relevant. This documentation can be crucial if the situation escalates.
5. **Review Your Contract:** Ensure you have a robust employment contract. CAMA's CAO Employment Contract Toolkit is an invaluable resource to help you understand your rights and protections. Consider approaching the contract with the same thoroughness as a "prenuptial agreement," addressing all terms and conditions – including mental health supports, sick leave, and other benefits – while relations are amicable. Addressing these matters upfront ensures clarity and avoids complications should issues arise later.
6. **Prepare for Transition:** If resolution seems unlikely, discuss with the Council the possibility of a mutual agreement for your departure. This can help ensure a smoother transition and protect your professional reputation.

If you cannot resolve the issues despite your best efforts, being prepared for a transition is the next best step. A well-negotiated exit can help preserve your professional integrity and set you up for future opportunities.

By being vigilant, proactive, and prepared, you can navigate the complexities of Council relationships and protect your career effectively.

Knowing When It's Time to Move On – Transitioning Out of the CAO Role

CAMA's Members in Transition Toolkit is a valuable resource not only for CAOs who are actively considering a career change but also for any working CAO reflecting on their leadership journey. It offers practical guidance on managing transitions effectively and is a good read to help you stay prepared, whether the time to move on is imminent or still years away.



Recognizing when it's time to leave is a critical leadership skill that ensures both your personal well-being and the long-term health of the organization. Here are a few key indicators:

- **Persistent Hostility or Dysfunction:** If incivility and organizational resistance continue to obstruct meaningful progress despite your best efforts to address them, it may be a signal that it's time to step away.
- **Diminished Impact:** When your capacity to positively influence the organization's direction is consistently undermined, it may be worth considering whether new leadership could better advance the municipality's goals.
- **Personal Well-Being:** If the role is negatively affecting your mental or physical health, relationships, or overall happiness, prioritizing your well-being and that of your family by moving on may be the best choice.

CAO Pro Tip: Exiting a municipality—whether through resignation, termination, or recognizing a misalignment with Council—requires as much strategy as onboarding. As CAO, safeguarding your professional reputation during a transition is key to your long-term career success. Maintain professionalism, control your narrative, and avoid public criticism of Council or staff. Prepare a thoughtful communication plan for both internal and external audiences, emphasizing continuity and your commitment to the municipality's well-being. Work collaboratively with Council to ensure a smooth handover and document key files for your successor. Lean on your professional network for support and perspective and remember how you exit is just as important as how you lead.

Preparing for Transitions: Exit Planning for CAOs

Every CAO journey comes to an end—sometimes by choice, and sometimes not. Whether your departure is planned or abrupt, how you prepare can shape not only your own well-being but also your legacy and your municipality's stability.

Acknowledge that transitions don't just affect your title—they affect your identity, your family, and your reputation. Voluntary exits often come with mixed emotions: excitement for new beginnings and grief for what's left behind. Involuntary departures—due to Council turnover, politics, or conflict—can carry stress, uncertainty, and reputational risk.

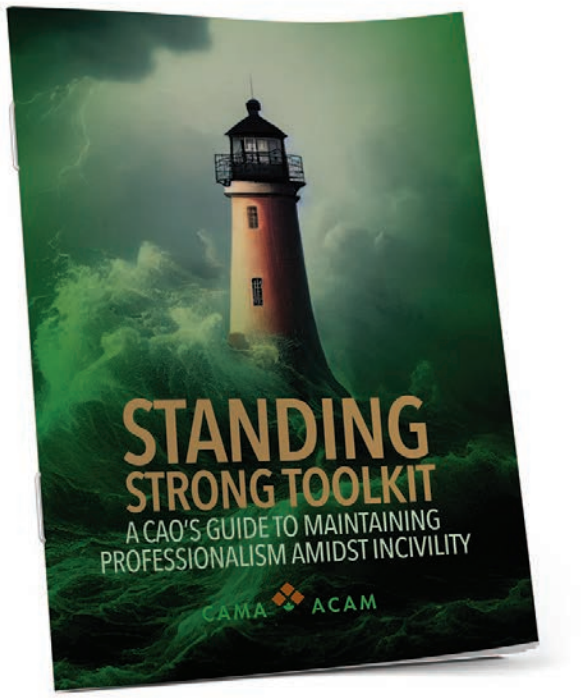
It's essential to plan ahead:

- **Legally:** Ensure your employment contract includes fair termination provisions, severance, and dispute resolution clauses (see **CAMA's CAO Employment Contract Toolkit**).
- **Emotionally:** Prepare yourself and your family for the pressures and emotions of leadership transitions. Identify supports early.
- **Reputationally:** Protect your integrity by staying professional, avoiding reactive communication, and leaving your organization better than you found it.

CAO Pro Tip: Think of your exit strategy as part of your leadership legacy. A thoughtful departure—regardless of the circumstance demonstrates professionalism, protects your credibility, and models ethical leadership for future municipal leaders.

PREVENTING INCIVILITY: TOP 10 TIPS FOR CAOS TO FOSTER RESPECTFUL RELATIONSHIPS WITH ELECTED OFFICIALS

For Chief Administrative Officers (CAOs) who have yet to encounter deteriorating relationships with elected officials, taking proactive measures is essential for preventing and mitigating potential instances of bullying or abusive behaviour.



Here are key strategies to help you set the stage for a respectful and productive working environment:

1 Set Boundaries Early	• Clearly communicate what constitutes acceptable and unacceptable behaviour from the outset. Establishing these boundaries early helps set the tone for respectful interactions. • Utilize orientation sessions with elected officials to outline expectations for professional conduct and to discuss the importance of mutual respect.
2 Have a Solid Employment Contract	• Ensure your employment contract includes key clauses that outline your role and responsibilities and protects against undue interference. • Regularly consult with legal advisors to keep your contract up-to-date and reflective of best practices. • Rather than relying solely on the employment contract, consider implementing dispute resolution procedures in workplace policies. This approach may provide more flexibility for addressing disputes and ensures that policies can be updated more easily in line with organizational changes.
3 Build Strong Relationships	• Foster open lines of communication with elected officials to build trust and mutual respect. Regularly engage in dialogue to address concerns before they escalate. • Schedule regular meetings with key officials to discuss ongoing projects and any potential issues. This proactive approach helps in maintaining a healthy relationship.
4 Open Communication: Stay Informed and Prepared	• Familiarize yourself with your municipality's policies on conduct and grievance procedures. Knowing the formal channels for addressing issues can guide your actions. • Participate in training programs on conflict management and leadership to stay equipped with strategies for handling difficult situations. • Communicate your leadership values and commitment to serve Council and staff. Some CAOs use mantras or favourite phrases on a regular basis that clearly articulate their core leadership values.

5 **Document Interactions**	• Keep thorough documentation of all interactions, especially those involving conflicts or potential abuse. Documenting dates, times, and details can provide crucial evidence if formal action becomes necessary.
6 **Utilize Support Networks**	• Connect with experienced CAOs who can provide guidance and support. Their insights can be invaluable in navigating challenging interactions. • Engage with associations like CAMA to access resources, training, and a network of peers.
7 **Promote a Culture of Respect**	• Lead by example and demonstrate respectful behaviour in all interactions. This sets a standard for others to follow. • Implement programs that recognize and reward respectful and professional behaviour among staff and elected officials.
8 **Implement Clear Policies and Procedures**	• Ensure that your municipality has clear policies on harassment and incivility. Reinforce these policies through regular training and communication. • Emphasize the importance of adhering to the Code of Conduct for all elected officials and staff.
9 **Proactive Communication Strategies**	• Utilize conflict resolution strategies such as active listening, finding mutual interests, and proposing compromises. • When necessary, engage neutral third parties to mediate conflicts and facilitate resolutions.
10 **Focus on Self-Care and be Ready for Formal Action**	• Prioritize self-care and stress management techniques to maintain your well-being and resilience. Dealing with abusive behaviour can be taxing, so it's important to take care of yourself. • If all other strategies fail and abusive behaviour persists, be prepared to file a formal complaint through established channels. Ensure your complaint is well-documented and supported by evidence.

By adopting these proactive measures and implementing preventive strategies, CAOs can establish a positive and supportive work environment that promotes respectful communication, collaboration, and ethical conduct. This foundation helps mitigate the risk of bullying or abusive behaviour and upholds the principles of ethical governance within municipalities.

CAMA stands ready to support CAOs through these challenges, providing resources and a network of peers to ensure you are never alone in your efforts.

CAO Pro Tip: You Are Not Alone in This Transition

Starting as a first-time CAO can feel overwhelming, and it's normal to experience moments of uncertainty, discomfort, or even imposter syndrome. Don't be embarrassed by the learning curve—every CAO, no matter how seasoned, has been exactly where you are right now. The role comes with unique challenges, but you are part of a network of professionals across the country who understand what you're going through and genuinely care about your success and well-being. There is no shame in reaching out for advice, mentorship, or simply to share your experiences. Someone else has faced the same obstacles, asked the same questions, and found a way forward—and so will you.

FUTURE PROOFING YOUR CAO CAREER

Sustaining a long and successful career as a CAO requires more than just managing day-to-day operations—it's about planning ahead and building resilience. The strategies below will help you future proof your career, ensuring you remain effective, adaptable, and positioned for long-term success in the evolving municipal landscape.

Future Proofing Your CAO Career: Top 10 Strategies

- Stay updated on municipal governance trends and best practices.
- Invest in professional development and executive training.
- Build strong relationships with regional and provincial counterparts.
- Advocate for a strong senior leadership team.
- Foster a mentorship culture within your organization.
- Develop contingency plans for leadership transitions.
- Strengthen your public communication and media skills.
- Balance innovation with practicality in municipal management.
- Engage in long-term strategic planning for sustainability.
- Leave a positive legacy—be remembered for your impact.
- Lead with transparency and strategic patience – assume public scrutiny and resist the urge to react impulsively. When in doubt, pause, assess, and respond thoughtfully.

CAO Pro Tip: Future proofing isn't just about reacting to change—it's about staying one step ahead. Make continuous learning and relationship-building part of your leadership routine. A well-connected and resilient CAO is better equipped to navigate disruption, manage Council dynamics, and lead with confidence through uncertainty. **Remember:** the best CAOs don't just manage the present—they actively shape the future.

CONCLUSION AND ACKNOWLEDGEMENTS

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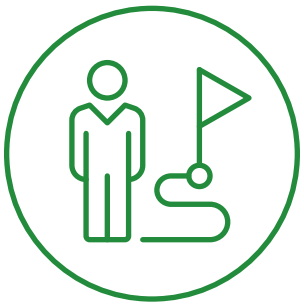
CONCLUSION – YOUR LEADERSHIP JOURNEY BEGINS

Becoming a CAO is more than a job—it's a calling to lead, to serve, and to shape the future of your community. The path ahead will bring both challenges and opportunities, but it also holds the potential for deep fulfillment and meaningful impact.

Success comes not from having all the answers, but from showing up with perseverance, curiosity, and the courage to grow through both victories and setbacks.

Remember, you're not in this alone. Across Canada, CAOs are walking similar paths. Tap into peer networks like CAMA, seek out mentorship, and use the tools and guidance at your fingertips. Community is one of your greatest leadership assets.

Your leadership will shape not just your organization—but the people, the place, and the progress of your entire municipality. Lead with integrity, stay resilient, and never underestimate the value of your voice and vision.



**You're ready. Now go lead boldly–
and make a difference that lasts.**

YOU ARE NOT ALONE: CAMA RESOURCES AND SUPPORT FOR CAOS

CAMA RESOURCES AND SUPPORT NETWORKS

Your CAO Network: Peer Support & Mentorship

Leadership can be isolating—but it doesn't have to be. As a first-time CAO, building a trusted network will be key to your growth and resilience. CAMA offers numerous ways to connect with peers who understand the pressures of the role. Participate in networking events like the Annual Conference, engage in Mastermind forums, and access webinars where CAOs from across the country share real-world insights.

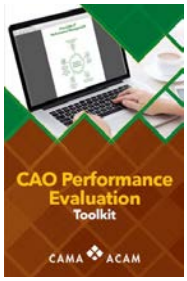
Mentorship opportunities are also available through CAMA's informal program, pairing you with seasoned municipal leaders who can offer practical guidance and support. Beyond CAMA, other national and Provincial and Territorial associations provide professional development, governance training, and advocacy tailored to your region.

Whether you're navigating tough Council dynamics or celebrating wins, your network of CAOs will serve as a sounding board and an essential leadership asset.

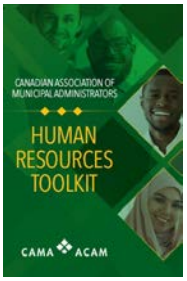
CAMA'S Toolkit Library – What's Inside

CAMA offers a comprehensive suite of toolkits for CAOs and senior local government managers. Some are publicly available, while others are exclusive to members.

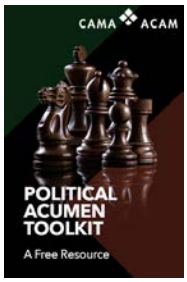
This resource assists in providing new Councils with the necessary information to begin their governance effectively. It helps build trust and establish a strong working relationship between the CAO and the Council from the outset.



A flexible resource offering best practices for fair and effective performance management. It guides CAOs and Councils in defining roles, fostering open dialogue, and aligning strategic goals for organizational success.

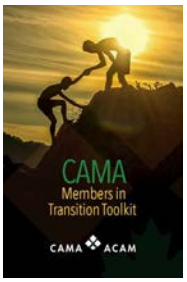


Designed to support CAOs of all sizes, this comprehensive Toolkit covers leadership, team building, recruitment, employee relations, compensation, and more. It provides over 200 best practices, policies, and templates for easy reference.

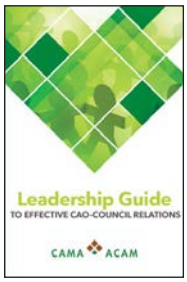


The Political Acumen Toolkit is essential for any employee municipal seeking to enhance political understanding - a crucial competency for current and future municipal leaders. Also a great resource for establishing internal mentorship programs.

This Toolkit supports CAOs in negotiating contracts with elected officials, offering guidance and best practices for both experienced and new CAOs.



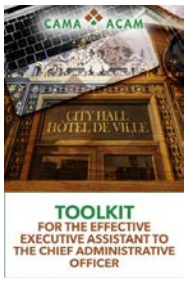
Provides resources and support for CAOs and their families during times of transition, aiding in accessing necessary resources efficiently.



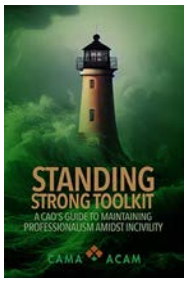
Recognizing the importance of a successful relationship with Council, this guide offers insights into building and maintaining effective CAO-Council relations.

This comprehensive resource is designed to empower municipalities in managing crises effectively, providing strategies and tools for crisis management.

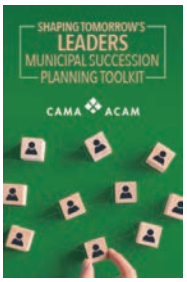
A practical resource that helps CAOs and municipal leaders frame the right questions to make informed, strategic decisions and foster effective governance.



A practical guide to help Executive Assistants strengthen their partnership with the CAO, improve administrative efficiency, and support organizational success. Includes a dedicated chapter for CAOs on fostering an effective working relationship with their EA.



A resource for CAOs to navigate and address incivility while maintaining professionalism, fostering resilience, and safeguarding leadership integrity amidst challenging dynamics.



A step-by-step guide that assists municipalities in developing proactive strategies to identify, mentor, and prepare future leaders, ensuring long-term organizational stability and success.

Toolkits Most Relevant for New CAOs

Here are the **eight toolkits** for new or early-career CAOs:

1. **Council Orientation Toolkit** (*public*) – Essential for onboarding Council and building strong relationships.
2. **Toolkit for Effective CAOs** – The Right Questions to Ask (*member*) – Helps structure early-stage inquiries to understand Council, staff, and organizational culture.
3. **Political Acumen Toolkit** (*public*) – Guides new CAOs on navigating political dynamics and stakeholder interests.
4. **CAO Performance Evaluation Toolkit** (*public*) – Sets up ongoing performance management and accountability processes from the start.
5. **CAO Employment Contract Toolkit** (*member*) – Crucial for establishing clear expectations and contract structure.
6. **Leadership Guide to Effective CAO-Council Relations** (*member*) – Builds foundational trust and collaboration with both seasoned and new Councillors.
7. **Standing Strong Toolkit** (*member*) – Equips new CAOs with strategies to handle incivility and workplace challenges.
8. **Human Resources Toolkit** (*member*) – Supports managers in setting up HR systems and workplace culture early in their tenure.

SAMPLE RESOURCES

Other Resources

- CAO Performance Evaluation Template
- Sample Completed Final Performance Evaluation Report for the CAO
- CAO Mandate Letter
- Sample Completed Mandate Letter for the CAO
- Performance Evaluation Review Template for Direct Reports
- Mandate Letter for Direct Reports
- A CAMA "White Paper" on Ontario's Strong Mayor Legislation and the Pivotal Role of the CAO in Providing Good Governance

APPENDIX "A"

Charting Your Course: CAO Success Checklist

This comprehensive checklist is designed for new and aspiring Chief Administrative Officers (CAOs) as a one-page leadership reference tool. It draws from the key themes of the 'Charting Your Course' Toolkit, covering readiness, governance, operations, and long-term sustainability. Whether you are stepping into the role for the first time or seeking to strengthen your leadership practice, this checklist will guide your transition, build credibility, and help you lead with purpose, confidence, and clarity.

1. Leadership Readiness & Transition

- ☐ I have assessed my readiness for the CAO role (governance, emotional intelligence, resilience, political acumen).
- ☐ I understand the difference between governing (Council) and managing (Administration).
- ☐ I have reviewed and negotiated a strong CAO employment contract.
- ☐ I am aware of the unique expectations and dynamics of the municipality I serve.
- ☐ I have a plan for the first 100 days to establish credibility, communication, and alignment.

2. Governance & Political Acumen

- ☐ I have built or am building trust-based relationships with each member of Council.
- ☐ I maintain neutrality and provide objective, strategic advice to Council as a whole.
- ☐ I document direction, especially when received outside of formal processes.
- ☐ I proactively manage governance challenges and Council transitions.
- ☐ I understand my role in navigating divided Councils without taking sides.

3. Strategic Implementation & Performance

- ☐ I have aligned operations with the Council's strategic plan and priorities.
- ☐ I monitor and report on municipal performance using measurable outcomes.
- ☐ I support effective policy execution through collaboration with the Senior Leadership Team.
- ☐ I regularly review progress with Council and adapt plans as needed.

4. Financial Management & Risk Mitigation

- ☐ I oversee fiscally responsible operating and capital budgets.
- ☐ I monitor financial health through clear reporting and long-term planning.
- ☐ I ensure transparent procurement and reserve policies are in place.
- ☐ I have established risk management and emergency preparedness strategies.

5. Human Resources & Organizational Leadership

- ☐ I lead by example and set the tone for respectful workplace culture.
- ☐ I conduct regular performance evaluations and leadership development.
- ☐ I support succession planning across all levels of the organization.
- ☐ I actively manage labour relations and workplace conflict with professionalism.
- ☐ I model ethical leadership and emotional intelligence, especially in times of tension.

6. Public Engagement & Communication

- ☐ I maintain a visible and accessible leadership presence in the community.
- ☐ I use clear, consistent messaging to build public trust.
- ☐ I embrace social media and digital tools for engagement and transparency.
- ☐ I communicate complex issues in plain language and apply the "Coffee Shop Test."

7. Intergovernmental Relations & Advocacy

- ☐ I build strong relationships with provincial, federal, and regional partners.
- ☐ I advocate for municipal priorities while navigating jurisdictional boundaries.
- ☐ I represent the municipality professionally at external meetings and events.

8. Innovation, Growth & Sustainability

- ☐ I encourage innovation and continuous improvement across the organization.
- ☐ I lead digital transformation and modernization of municipal systems.
- ☐ I support economic development and long-term infrastructure planning.
- ☐ I promote sustainable service delivery and climate resilience strategies.

9. Self-care & Long-term Success

- ☐ I prioritize well-being and maintain healthy boundaries.
- ☐ I have a strong peer network or mentor through CAMA or other associations.
- ☐ I reflect regularly on my leadership style, growth areas, and legacy goals.
- ☐ I am preparing for the future—succession planning, knowledge transfer, and leadership sustainability.

APPENDIX "B"

Terms of Reference for Council Projects

Purpose

To develop a Business Plan to explore the potential amalgamation of emergency services across two neighbouring jurisdictions, under the leadership of one designated partner. It is acknowledged that a new central operations facility is under consideration and may serve as the future headquarters for the merged service.

The Business Plan will:

a) Identify essential, important and discretionary services and service levels.

b) Assess organizational capacity for a regional service.

c) Identify potential staff structures and governance models to manage a regional service.

d) Identify potential cost savings and efficiencies through service amalgamation.

List of Participants

To be determined by the participating municipalities.

List of Stakeholders

- Local municipalities within the affected regions
- Health and emergency care providers
- Regulatory and oversight bodies
- Relevant provincial or territorial ministries
- Partner agencies impacted by service delivery changes

Intended Users/Audience

The Business Plan will support independent decision-making by the participating municipalities regarding the feasibility and value of service amalgamation.

Quetions to be Answered

- Are there efficiencies to be gained by sharing service delivery?
- Are there best practices to guide the potential integration of services?
- Can duplication be reduced through shared services?
- Are there opportunities to reduce liabilities under a shared model?
- Can service levels be improved or access to services enhanced?
- Could shared services improve eligibility or positioning for external funding or grants?
- Would shared services equalize or standardize service delivery across jurisdictions?
- Is there a potential for cost savings for each partner?

Guiding Principles

To be defined collaboratively by the Working Group.

Methodology

- The Working Group will meet regularly (e.g., monthly) on a predetermined schedule.
- Meeting locations will rotate between the participating jurisdictions.
- Chief Administrative Officers (CAOs) or designated senior leaders from each jurisdiction will co-chair the meetings.
- Minutes will be recorded by the host jurisdiction's administrative support.
- Each meeting will include a standing agenda item titled Key Messages, summarizing outcomes and next steps to be shared with Council and staff.

Deliverables

A comprehensive Business Plan will be developed, following an agreed-upon template.

Reporting Requirements

A comprehensive Business Plan will be developed, following an agreed-upon template.

Decision-making Process/Responsibilities

Decisions will be made jointly by the designated senior administrators from each participating jurisdiction, based on mutual agreement.

Estimation of Costs

The Working Group does not anticipate requiring external facilitation. Costs will primarily include internal staff time and travel expenses.

APPENDIX "C"

Understanding the RASCI Method: A Tool for Role Clarity & Team Effectiveness

What is RASCI?

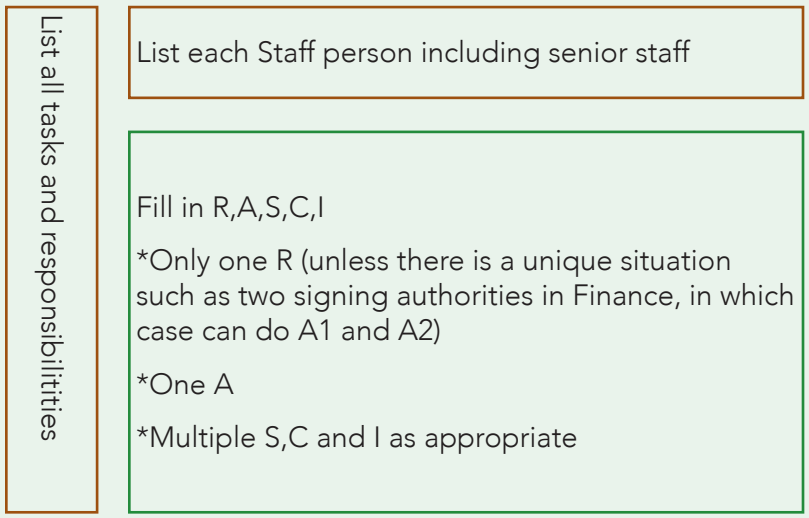
RASCI is a responsibility assignment matrix that clarifies **who does what** in an organization. It is a simple, yet powerful framework used to map out tasks and responsibilities across team members, departments, or projects. As a first-time CAO, using RASCI can be a game-changer—especially when stepping into a new team dynamic, leading organizational restructuring, or building accountability and collaboration from the ground up.

This tool supports not just clarity, but team empowerment. It shifts vague expectations into transparent agreements. Staff gain confidence in their roles, silos begin to dissolve, and "no one knows how much I do" turns into a shared understanding of contributions.

RASCI Stands For

- (R) **Responsible:** The "doer" – owns the task and executes the work. (Only one per task)
- (A) **Approves:** The decision-maker who signs off or approves the work. (Only one per task)
- (S) **Supports:** Assists the task by contributing work or resources.
- (C) **Consulted:** Provides input or expertise – two-way communication.
- (I) **Informed:** Needs to be kept in the loop – one-way communication.

RASCI Overview Chart: Applying the RASCI Method in Municipal Teams

Section	Key Details
Benefits for Municipal Teams	• Crystal-clear role clarity. • Avoids gaps and overlaps in duties. • Promotes efficient workload distribution. • Improves team dynamics and communication. • Identifies resourcing needs. • Supports onboarding, succession planning, and performance management.
How to Create a RASCI Chart	1 **List tasks** (down the vertical axis): Include all duties—current and ideal. Consult broadly with staff to ensure nothing is missed. 2 **List staff** (across the top): Include everyone involved, including other departments or potential new hires. 3 **Assign R, A, S, C, I** to each task: • Only one R and A per row (except rare cases like co-signing authorities). • Multiple S, C, I as appropriate. 

Section	Key Details
Two Approaches to Conducting RASCI	• **Group Work:** Facilitated, often full-day session with all team members. Consensus is built through open discussion. • **Individual Input + Group Review:** Each staff member fills in their own chart first. Responses are merged (often color-coded) to reveal misalignments and used to spark constructive conversation. This method is especially effective when team tensions or power imbalances exist. The final chart is completed by group discussion and consensus.
Next Steps	• **Review role balance:** Analyze each column by staff member to check for overload or underuse. • **Address gaps:** Highlight neglected or misaligned tasks and reassign as needed. • **Circulate the draft:** Allow reflection and feedback before finalizing. • **Make it a living document:** Revisit periodically as roles, structures, or priorities evolve. • **Use it to validate and justify new positions**

Final Thought for First-Time CAOs

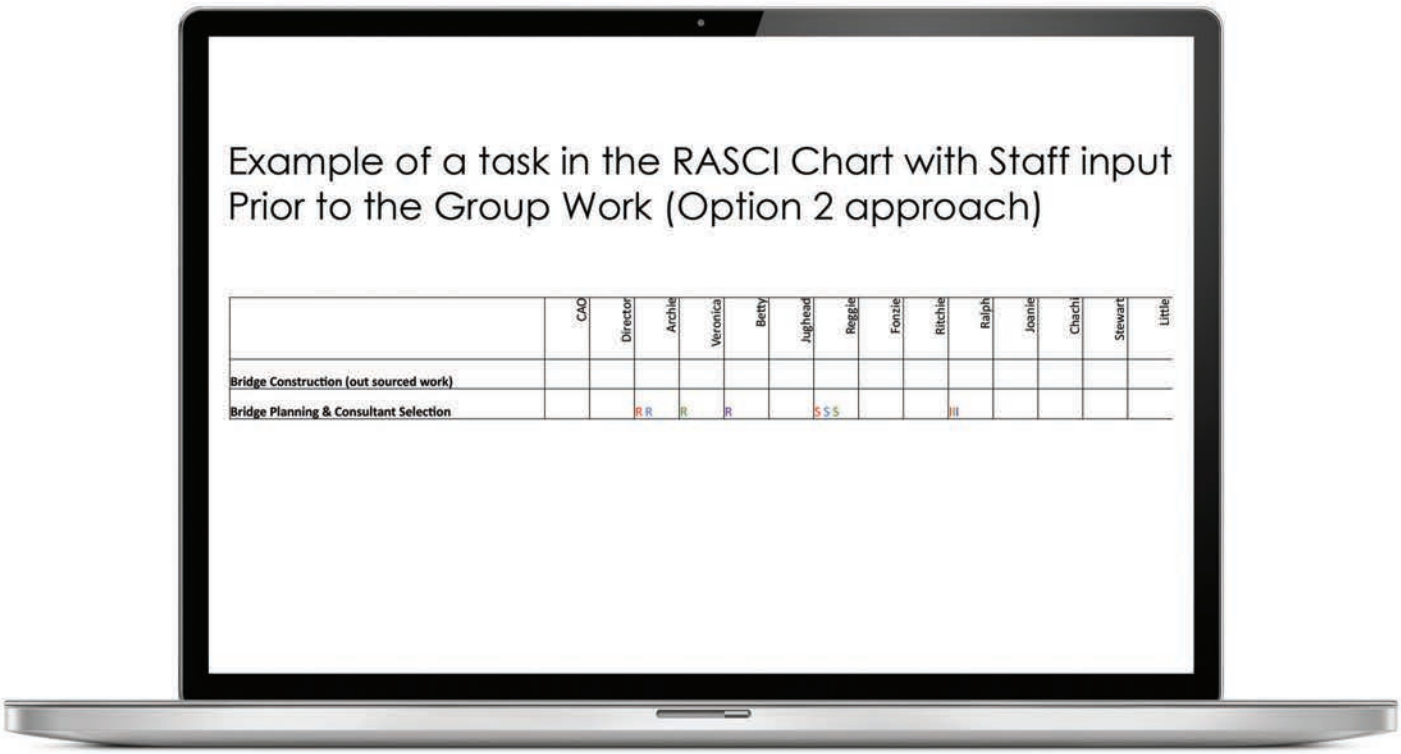
The RASCI process is just as valuable as the chart itself. It's not just about efficiency—it's about inclusion, voice, and transparency. Done well, RASCI fosters shared understanding, equity in workload, and improved relationships. Staff feel heard, seen, and empowered. Misunderstandings are surfaced in a safe, structured way, reducing tension and helping the team move from confusion to clarity.

When the **CAO takes the lead** in initiating or facilitating the RASCI process, it sends a powerful message of collaborative leadership. It shows a commitment to organizational health, clarity, and fairness. It also demonstrates that the CAO values staff input and is invested in creating a high-functioning, respectful workplace.

Leading this process also provides the CAO with invaluable insights into team dynamics, workload distribution, and potential areas of risk or burnout—information that can guide future planning and HR decisions.

This tool helps your team work better together—and feel better while doing it. It builds trust, strengthens communication, and lays the foundation for a stronger organizational culture.

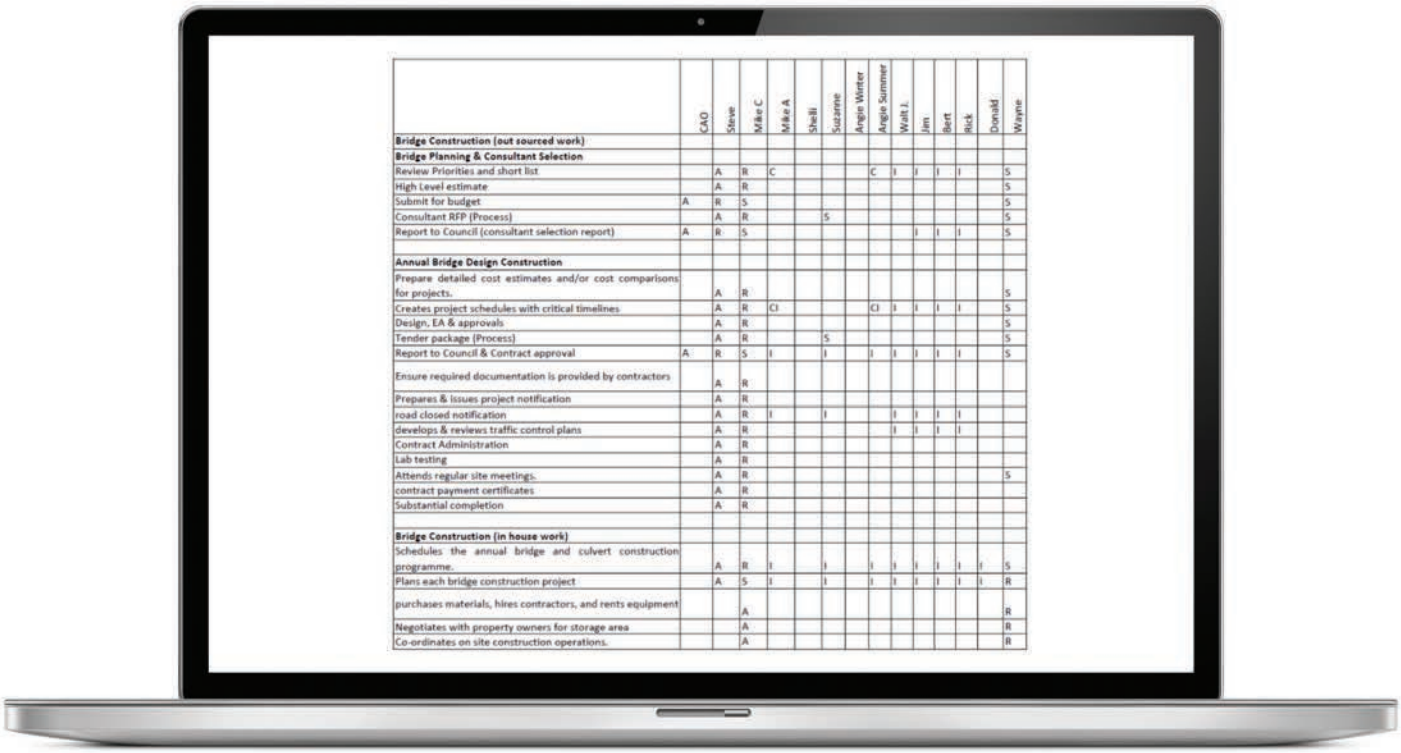
Example of a Task in the RASCI Chart with Staff input Prior to the Group Work (Option 2 approach)



The input from staff prior to the session shows that different staff believe they are responsible for the task and inconsistency in who suports and is informed. During the group work it is discussed, and agreed by consensus, who ultimately gets the R and who gets S, C and I.

If there is tension in the group it is helpful to see these kinds of differences of opinion ahead of time. It is not necessary but can help staff see that conflict might be coming from uncertainty rather than personal feelings.

Example of a Completed RASCI Chart



	CAO	Steve	Mike C	Mike A	Shelli	Suzanne	Angie Winter	Angie Summer	Walt J.	Jim	Bert	Rick	Donald	Wayne
Bridge Construction (out sourced work)														
Bridge Planning & Consultant Selection														
Review Priorities and short list		A	R	C				C	I	I	I	I		S
High Level estimate		A	R											S
Submit for budget	A	R	S											S
Consultant RFP (Process)		A	R			S								S
Report to Council (consultant selection report)	A	R	S							I	I	I		S
Annual Bridge Design Construction														
Prepare detailed cost estimates and/or cost comparisons for projects.		A	R											S
Creates project schedules with critical timelines		A	R	CI				CI	I	I	I	I		S
Design, EA & approvals		A	R											S
Tender package (Process)		A	R			S								S
Report to Council & Contract approval	A	R	S	I		I		I	I	I	I	I		S
Ensure required documentation is provided by contractors		A	R											
Prepares & issues project notification		A	R											
road closed notification		A	R	I		I			I	I	I	I		
develops & reviews traffic control plans		A	R						I	I	I	I		
Contract Administration		A	R											
Lab testing		A	R											
Attends regular site meetings.		A	R											S
contract payment certificates		A	R											
Substantial completion		A	R											
Bridge Construction (in house work)														
Schedules the annual bridge and culvert construction programme.		A	R	I		I		I	I	I	I	I	I	S
Plans each bridge construction project		A	S	I		I		I	I	I	I	I	I	R
purchases materials, hires contractors, and rents equipment			A											R
Negotiates with property owners for storage area			A											R
Co-ordinates on site construction operations.			A											R

APPENDIX "D"

Provincial & Territorial Associations

- Association of Municipal Administrators of New Brunswick
- Association of Municipal Administrators of Nova Scotia
- Association of Municipal Administrators, Prince Edward Island
- Professional Municipal Administrators of Newfoundland and Labrador
- Association des directeurs généraux des municipalités du Québec (en français seulement)
- Association of Municipal Managers, Clerks and Treasurers of Ontario
- Ontario Municipal Administrators' Association
- Manitoba Municipal Administrators' Association
- Rural Municipal Administrators Association of Saskatchewan
- Urban Municipal Administrators Association of Saskatchewan
- Local Government Administration Association of Alberta
- Society of Local Government Managers of Alberta
- Alberta Rural Municipal Administrators' Association
- Local Government Management Association of British Columbia
- Local Government Administrators of the Northwest Territories
- Association of Yukon Communities
- Nunavut Association of Municipalities

APPENDIX "E"

Glossary of Municipal Terms

Term	Definition
Accountability	The obligation of an individual or organization to account for its activities, accept responsibility for them, and disclose results transparently.
Amortization	The gradual reduction of a capital asset's value over its useful life due to wear, usage, or obsolescence. It is a non-cash expense reflected in financial statements.
Asset Depreciation	Similar to amortization; a method of allocating the cost of a tangible asset over its useful life for accounting and budgeting purposes
Asset Management	The systematic process of developing, operating, maintaining, upgrading, and disposing of assets cost-effectively to sustain municipal services.
Audit	An independent examination of a municipality's financial statements to ensure accuracy, compliance, and accountability. Conducted annually and reported to Council.
Budgeting	The process of creating a financial plan that allocates resources for various municipal operations, capital projects, and strategic initiatives.
Bylaws	Local laws and regulations enacted by a municipal Council to govern activities within the community.
CAO Performance Review	A formal evaluation process conducted by Council to assess the CAO's effectiveness, leadership, and goal attainment.
Capital Budget	A budget focused on long-term investments in infrastructure and assets, such as roads, facilities, and equipment.

Term	Definition
Capital Planning	The process of identifying, prioritizing, and funding long-term infrastructure and facility investments.
Chief Administrative Officer (CAO)	The senior administrative leader in a municipality responsible for implementing Council policies, overseeing daily operations, and advising elected officials on policy and strategy.
Citizen Engagement	The practice of involving residents in municipal decision-making through public consultations, surveys, and forums.
Community Development	Initiatives aimed at improving the social, economic, and environmental well-being of a municipality.
CAO-Council Protocol	A structured agreement outlining the roles, responsibilities, and communication practices between the municipal Council and the Chief Administrative Officer.
Council Code of Conduct	The ethical guidelines that define appropriate behaviour and decision-making expectations for elected officials.
Council Meeting Procedures	The formal rules governing how Council meetings are conducted, including agendas, motions, and voting protocols.
Council Orientation	The process of educating newly elected officials about municipal governance, policies, and their role in decision-making.
Collective Bargaining	The negotiation process between a municipality and employee unions regarding wages, benefits, and working conditions.
Conditional Grants	Funds provided without restrictions or their use, allowing municipalities to allocate funds according to local priorities.
Crisis Management	The strategies and actions taken to address and mitigate the impact of emergencies or unexpected events within a municipality.
Debt Financing	The use of borrowed funds (e.g., bonds, loans) to finance municipal infrastructure and capital projects.
Debt Limit	A provincially mandated cap on the amount of debt a municipality can incur, typically expressed as a percentage of revenues. It ensures municipalities remain fiscally responsible.

Term	Definition
Debt Servicing	The annual cost of repaying principal and interest on municipal debt. Managing debt servicing is essential for long-term affordability.
Deficit	When expenditures exceed revenues in a fiscal year. Persistent deficits may signal financial stress and require corrective planning.
Delegation of Authority	The process by which Council grants decision-making powers to the CAO or other staff to manage operational matters.
Development Charges (DCs)	Fees imposed on developers to fund infrastructure and services needed due to new growth.
Economic Development Strategy	A municipal plan to attract businesses, create jobs, and promote sustainable growth.
Environmental Sustainability	Policies and practices that promote responsible use of natural resources and climate resilience in municipal operations.
Financial Statements	Official reports summarizing a municipality's financial position and performance, typically including the Statement of Operations, Statement of Financial Position, and Statement of Cash Flows.
Freedom of Information (FOI) Requests	The legal process by which citizens can request access to municipal records and information.
Governance	The framework of rules, practices, and processes used to direct and manage a municipality, emphasizing accountability, fairness, and transparency.
Growth Management	Planning strategies to ensure sustainable land use, infrastructure, and services in response to population growth.
Human Resources (HR) Management	The practice of recruiting, developing, and managing employees to align with the organization's goals and maintain a productive workforce.
Infrastructure Deficit	The gap between the municipality's infrastructure needs and its ability to fund necessary repairs and upgrades.

Term	Definition
Intergovernmental Relations	The collaboration and negotiation between municipal, provincial, and federal governments to advance municipal priorities.
Legislative Frameworks	The legal guidelines and policies set by provincial, territorial, or federal governments that outline the powers, responsibilities, and operations of municipalities.
Mill Rate (Tax Rate)	The rate used to calculate property taxes, expressed as the amount of tax payable per $1,000 of assessed property value. It is set by Council based on budgetary requirements and determines how much property owners owe.
Municipal Act	The legislation that outlines the powers, responsibilities, and governance framework of municipalities in each province or territory.
Municipal Clerk	The official responsible for record-keeping, Council procedures, and legal compliance within a municipality.
Municipal Taxation	The system through which municipalities generate revenue, including property taxes, user fees, and other levies.
Official Community Plan (OCP)	A long-term vision document outlining land use, transportation, housing, and growth strategies for a municipality.
Open Meeting Laws	Regulations that require municipal Council and committee meetings to be open to the public, ensuring transparency.
Operating Budget	The financial plan for day-to-day municipal operations, including salaries, utilities, maintenance, and services.
Operational Leadership	The management of daily municipal operations to ensure services are delivered effectively and align with strategic objectives.
Orders of Government	The distinct but complementary jurisdictions in Canada's governance system, including the federal, provincial/territorial, municipal, and Indigenous governments. This terminology reflects partnership rather than hierarchy.

Term	Definition
Own-Source Revenues	Funds raised directly by the municipality (e.g., property taxes, user fees, permits), excluding grants or transfers from other governments.
Performance-Based Budgeting	A budgeting approach that ties funding to the achievement of specific service outcomes and goals.
Performance Evaluation	A systematic process of assessing the effectiveness and contributions of employees or leaders, typically tied to organizational goals and objectives.
Policy Implementation	The process of translating Council-approved policies into actionable plans and procedures to achieve desired outcomes.
Power Wheel	A strategic leadership tool used to identify and manage relationships with key stakeholders, ensuring alignment and collaboration to achieve municipal goals.
Procurement Policy	The regulations and procedures governing how municipalities purchase goods, services, and infrastructure.
Public Accountability Standards	The ethical and procedural benchmarks municipalities follow to ensure transparency, fairness, and responsiveness in their actions and decisions.
Public-Private Partnerships (P3s)	Collaborative agreements between municipalities and private sector entities to fund, build, or operate public infrastructure and services.
Reserves	Funds set aside for specific future needs or contingencies (e.g., infrastructure renewal, emergencies). They promote financial sustainability and help manage risk.
Reserve Funds	Segregated municipal funds established by bylaw for designated purposes, such as capital replacement, stabilization, or development.
Risk Management	Strategies to identify, assess, and mitigate risks associated with municipal governance, finance, and operations.
Service Delivery Model	The method by which municipalities provide services, such as direct delivery, partnerships, or contracted services.

Term	Definition
Stakeholder Analysis	The process of identifying and understanding individuals, groups, or organizations that can impact or are impacted by municipal operations, policies, or projects.
Strategic Planning	The process of defining a municipality's long-term vision, setting priorities, and developing actionable steps to achieve its goals.
Succession Planning	A proactive approach to identifying and preparing employees for future leadership roles to ensure organizational continuity.
Surplus	When revenues exceed expenditures in a fiscal year. Operating surpluses can be allocated to reserves or used to offset future costs.
Tangible Capital Assets (TCAs)	Long-term physical assets used in municipal service delivery (e.g., roads, buildings, equipment), recorded and depreciated over time.
Tax Levy	The total amount of property taxes that a municipality collects to fund operations and capital projects.
User Fees	Charges imposed on individuals or businesses for specific municipal services (e.g., recreation, water, waste management), based on usage.

APPENDIX "F"

Guidance for Councils: How to Support a Successful CAO Transition

Starting a new role as a Chief Administrative Officer (CAO) can be challenging, and the support of the Council is critical in setting the CAO up for success. Below is a Top 10 List of ways Council members can provide effective support during this transition.

Term	Practical Tips
1 **Provide a Comprehensive Onboarding Package**	A well-prepared onboarding package equips the CAO with the essential knowledge to start strong. • **Include Key Documents:** Provide strategic plans, budgets, organizational charts, recent Council meeting minutes, and relevant policies. • **Highlight Priorities:** Outline immediate goals and ongoing projects to help the CAO focus their efforts. • **Provide Context:** Share historical insights, key challenges, and successes to familiarize the CAO with the municipality's journey.
2 **Schedule an Orientation Session**	An in-depth orientation helps the CAO understand the Council's vision, priorities, and expectations. • **Introduce Roles and Responsibilities:** Clearly outline the governance role of Council versus the administrative role of the CAO. • **Discuss Strategic Goals:** Ensure alignment on short- and long-term priorities. • **Familiarize the CAO with Council Culture:** Share preferred communication styles and decision-making processes.

Term	Practical Tips
3 **Foster Open Communication**	Establishing transparent and consistent communication with the CAO is essential for building trust. • **Set Regular Check-Ins:** Schedule one-on-one meetings with the CAO to discuss updates, challenges, and progress. • **Provide Constructive Feedback:** Offer timely and actionable feedback to help the CAO adjust and improve. • **Encourage Questions:** Create an environment where the CAO feels comfortable seeking clarification or guidance.
4 **Establish Clear Expectations**	Ambiguity can create confusion and hinder progress. Define expectations early to ensure alignment. • **Clarify Success Metrics:** Outline what success looks like for the CAO in the first 100 days and beyond. • **Set Boundaries:** Clearly distinguish between Council's governance responsibilities and the CAO's operational duties. • **Agree on Communication Protocols:** Determine how and when the CAO will report progress to Council.
5 **Support Relationship-Building Efforts**	Help the CAO build relationships with key stakeholders to facilitate collaboration and trust. • **Introduce the CAO to Key Contacts:** Facilitate introductions to department heads, community leaders, and regional partners. • **Host a Public Welcome:** Arrange an event where residents and local businesses can meet the CAO, fostering community connection. • **Encourage Collaboration:** Support the CAO's efforts to engage with staff and stakeholders across the municipality.
6 **Provide Adequate Resources**	Ensure the CAO has the tools, staff, and resources needed to perform their duties effectively. • **Assess Organizational Capacity:** Review whether the current staff structure supports the CAO's strategic goals. • **Invest in Professional Development:** Support the CAO in attending training, conferences, and peer networking events. • **Provide Administrative Support:** Assign experienced staff to assist with onboarding and day-to-day operations during the transition.

Term	Practical Tips
7 **Be Patient and Realistic**	Transitions take time, and the CAO will need a grace period to learn the organization and implement changes. • **Allow Time for Assessment:** Give the CAO space to review processes, meet stakeholders, and identify priorities. • **Set Realistic Goals:** Avoid overwhelming the CAO with too many demands or unrealistic deadlines in their first months. • **Celebrate Small Wins:** Acknowledge early successes to boost morale and build momentum.
8 **Avoid Micromanaging**	Respect the CAO's expertise and allow them to lead while providing guidance when needed. • **Trust Their Judgment:** Avoid questioning every decision or directing operational matters. • **Focus on Governance:** Stay within the Council's role of setting policy and strategic direction. • **Encourage Autonomy:** Empower the CAO to make decisions and lead the organization effectively.
9 **Facilitate Governance Training**	Invest in governance training to ensure Council and the CAO work effectively together. • **Clarify Roles and Responsibilities:** Help Council members understand the distinction between policy and administration. • **Address Group Dynamics:** Use training sessions to foster teamwork and collaboration among Council members. • **Promote Best Practices:** Share examples of successful governance-CAO relationships to set a positive tone.
10 **Demonstrate Unified Support**	A united Council sends a strong message of trust and confidence in the CAO's leadership. • **Speak with One Voice:** Avoid sending conflicting messages or directives to the CAO. • **Resolve Disagreements Privately:** Address Council conflicts internally rather than involving the CAO. • **Show Public Support:** Publicly affirm your confidence in the CAO to build their credibility with staff and the community.

APPENDIX "G"

The PowerWheel Concept – Building Strong Relationships Through Strategic Leadership

Building strong relationships is a cornerstone of effective leadership for any Chief Administrative Officer (CAO). Success requires open communication, transparency, empathy, and consistent engagement with staff, residents, and community partners. The Power Wheel framework—centered on **Partnership, Openness, Willingness, Ethics, and Reliability**—provides CAOs with a versatile tool to cultivate trust and foster collaboration across stakeholder groups.

This approach enhances a CAO's ability to lead confidently while promoting a connected and resilient municipal administration. Complementing this, **CAMA's Right Questions to Ask Toolkit** offers practical guidance for engaging in meaningful conversations with staff and external stakeholders. Leveraging both structured inquiry and the Power Wheel principles, CAOs can navigate internal operations, town halls, and community partnerships with greater purpose and impact—laying the foundation for a successful and collaborative leadership journey.

Applying the Power Wheel Framework

Each element of the Power Wheel contributes to building trust and strengthening relationships with key stakeholders:

Partnership	• **Collaborate with Stakeholders:** Foster collaborative partnerships with various stakeholders, including community groups, businesses, and non-profits. Actively seek their input and involvement in decision-making processes. • **Listen Actively:** Be an active listener and genuinely consider the input and perspectives of community members. Show that you value their opinions and are willing to work together to find solutions.
Openness	• **Transparency:** Promote transparency in all aspects of municipal governance. Make information, decisions, and processes accessible to the public. Be open about challenges and constraints. • **Communication:** Establish clear and open communication channels. Regularly update the community on municipal initiatives, progress, and outcomes.
Willingness	• **Flexibility:** Be adaptable and willing to adjust plans based on community feedback and evolving needs. Show a willingness to explore new approaches and consider innovative solutions. • **Community Involvement:** Encourage community involvement in municipal activities, whether through volunteer opportunities, advisory committees, or participatory budgeting.
Ethics	• **Integrity:** Uphold high ethical standards in your leadership. Be honest, fair, and consistent in your decisions. Avoid conflicts of interest and ensure the municipality's actions align with its values. • **Accountability:** Hold yourself and your team accountable for their actions. Be transparent about how decisions are made, and acknowledge mistakes when they occur.
Reliability	• **Consistency:** Maintain consistency in your actions and decisions. Build a track record of reliability, so the community knows what to expect from your leadership. • **Quality Services:** Ensure the municipality provides high-quality services and consistently meets or exceeds the community's expectations.

CAO PowerWheel

Identifying Key Stakeholders in Your Power Wheel

Establishing relationships across different sectors is fundamental to building a well-rounded Power Wheel. Key stakeholders include:

- **Mayor and Council** – The primary decision-makers guiding municipal governance.
- **Municipal Staff** – Senior management, key staff influencers, and union representatives.
- **CEOs of Civic Operating Agencies** – Leadership from organizations such as airports and convention centres.
- **Business Leaders & Associations** – Representatives from local business groups, such as the Chamber of Commerce.
- **Government Contacts** – Elected officials and key staff at provincial and federal levels.
- **Public Service Leaders** – Representatives from schools, universities, and healthcare institutions.
- **Community Leaders & Volunteers** – Influential figures within civil society and community-based organizations.

Building Relationships with Stakeholders

Once key stakeholders are identified, initiate meetings to understand their perspectives on municipal government, staff, and services. Ask:

- What challenges are they facing?
- How do they perceive local government?
- What suggestions do they have for improving collaboration?
- How can municipal leadership better support their needs?

Share your plans, priorities, and goals for the municipality and seek input. Establishing these connections early fosters ongoing communication and collaboration, which will be invaluable throughout your career as CAO.

The Power Wheel as a Circle of Influence

The Power Wheel consists of two interconnected circles:

1. **The Inner Circle** – Represents your direct authority and decision-making space within the municipality. This is your leadership frontier, where you control policy implementation, administrative decisions, and operational oversight (Mayor and Council, Senior Leadership Team, Union Leaders, etc.).
2. **The Outer Circle** – Represents stakeholders beyond your formal authority, such as business leaders, community organizations, and external agencies. These individuals and groups influence municipal governance but do not report directly to you.

True leadership requires stepping beyond the inner circle to engage with external stakeholders and navigate complex challenges. While it may be easier to remain within the boundaries of direct authority, real impact happens in the outer circle, where collaboration, advocacy, and strategic partnerships drive meaningful change.

Managing Leadership Risks

Leadership inevitably involves resistance. Taking a stand on controversial issues can place CAOs in difficult positions, especially when decisions do not align with all stakeholders. Some leaders have faced career risks for championing initiatives that were unpopular but in the municipality's best interest.

To mitigate risks while maintaining influence, build strong alliances within your Power Wheel. A well-established network of trusted partners and supporters can provide stability when navigating contentious situations.

Keys to Building a Strong Power Wheel

Start by building your Power Wheel before you need it—establishing relationships proactively is far more effective than scrambling during a crisis. Recognize that every stakeholder in your Power Wheel has their own unique agendas and perspectives; understanding these motivations will help you navigate challenges more effectively. Be mindful of blind spots, as many senior leaders often overlook key influencers within their organization. Front-line staff, in particular, can provide invaluable insights into day-to-day operations, so it's essential to build trust with them and seek their input for a more unfiltered and practical perspective on municipal issues.

Engaging staff is critical and can be done by setting clear, visible corporate goals. Consider creating annual CAO corporate goals that are displayed prominently throughout municipal offices and facilities. To strengthen connections further, host an annual CAO Road Show where you visit various city workplaces—such as fire halls, transit garages, and public works sites—to report on past-year achievements, outline new priorities, address community misconceptions, and hold Q&A sessions with staff. Whenever possible, conduct these meetings alone, without senior management present, to foster open and candid dialogue.

Additionally, use data-driven engagement tools to enhance collaboration and efficiency across departments. Leverage staff engagement surveys and apply Lean Six Sigma methodologies (or other continuous improvement methods), such as waste walks, visual management, and daily management huddles (Plan-Do-Check-Act), to create a culture of continuous improvement and to break down silos within the organization.

Key Relationships to Build into Your Power Wheel

To strengthen your influence and navigate challenges effectively, cultivate relationships with:

- **Allies & Partners** – You cannot succeed in isolation. Strong partnerships increase resilience.
- **Constructive Critics** – Engage with those who challenge your views to understand their concerns and mitigate opposition.
- **Mayor & Council** – Stay attuned to the pressures they face and provide strategic support.
- **Stakeholders Affected by Decisions** – Proactively communicate with groups who may be negatively impacted by municipal policies.
- **Trusted Confidants** – Maintain personal and professional allies who provide unbiased advice and support.

Incorporating the principles of the Power Wheel into your leadership approach fosters trust, transparency, and collaboration across all stakeholder groups.

YOU ARE NOT ALONE

Chart Your Course with Confidence.

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