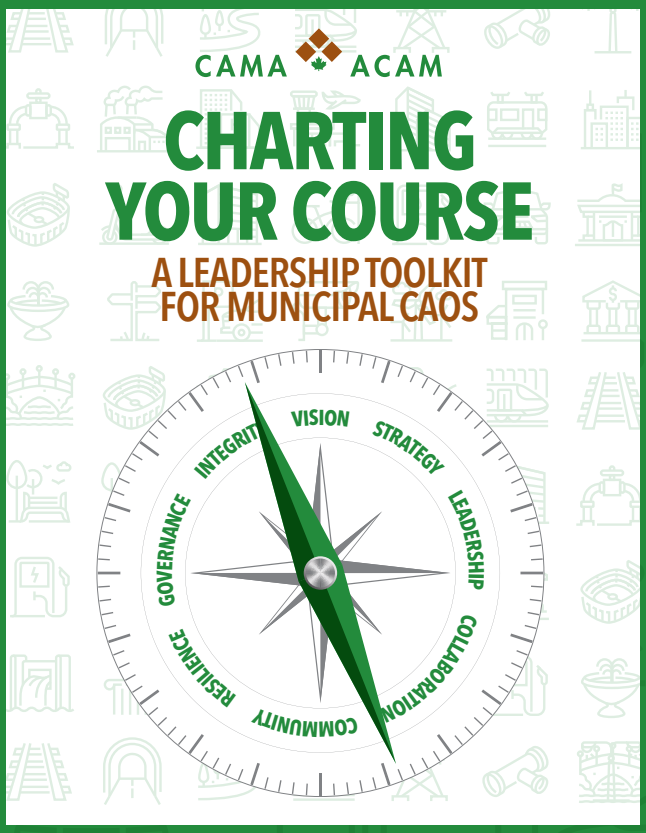


YOUR QUICK REFERENCE TO CHECKLISTS, TIPS & MUST-HAVE TOOLS

YOUR QUICK REFERENCE TO CHECKLISTS, TIPS & MUST-HAVE TOOLS

Your Role. Your Journey. Your Reference.

This companion document brings together all of the key checklists, tables, and Top 10 lists from *Charting Your Course: A Leadership Toolkit for Municipal CAOs* into one streamlined, easy-to-navigate format.

Whether you're preparing for Day One, tackling a tough challenge, or simply looking for a refresher on best practices, this guide offers quick access to the most practical, actionable tools in the full Toolkit. From onboarding checklists and interview questions to top strategies for political acumen, burnout prevention, conflict resolution, and relationship building with Council—these pages are designed to support you in real time, at every step of your CAO journey.

Use this document to:

- Quickly locate the most referenced tools without flipping through the full Toolkit.
- Share key pages with your Council, leadership team, or HR support.
- Keep a printout or digital copy at your fingertips for meetings, reflections, or planning sessions.

This isn't just a shortcut—it's a strategic support tool, intentionally curated for those who lead at the highest level of municipal administration. Because even the most experienced CAOs benefit from having the right tools, in the right format, at the right time.

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.

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

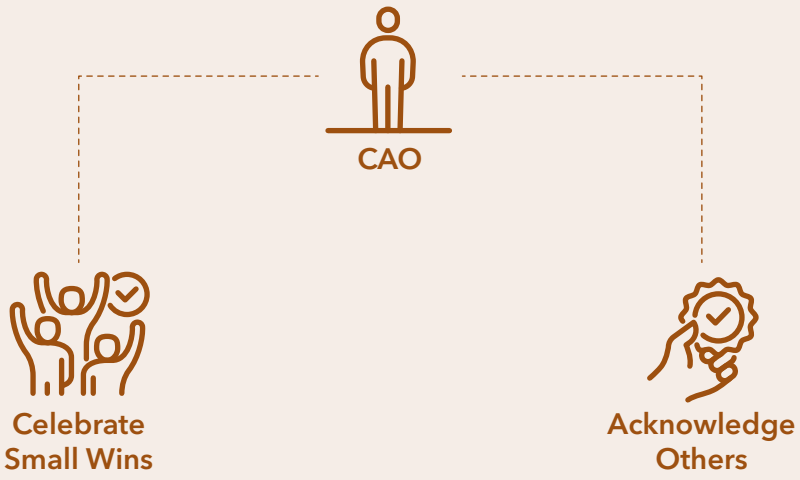
The work will never be "done." Set clear boundaries for your time, well-being, and personal life. Burnout serves no one—not your organization, not your staff, and certainly not you.

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.



What are the Different Orders of Government Responsible For?

Municipal 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.

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

Provincial/Territorial Government

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.

Responsibilities

- 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

Federal Government

The **Federal** government's responsibilities generally affect the entire country.

Responsibilities

- 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

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

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.

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.

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.

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.

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?

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.

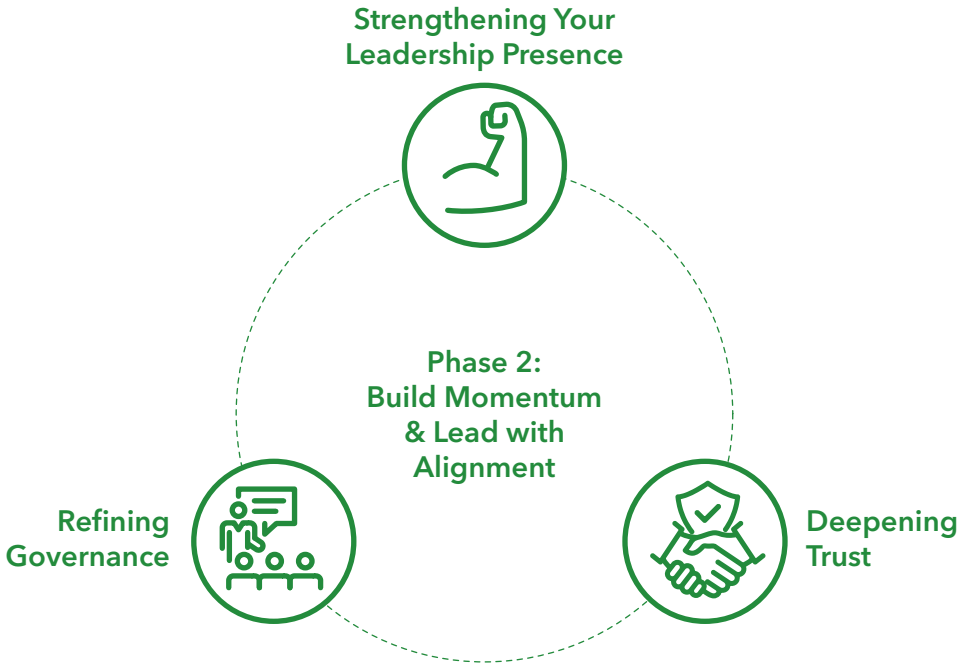
This is a natural part of working in a political environment, where elected officials are often the public face of municipal accomplishments. While collaborative wins are the goal, you must be prepared to take pride in the positive impact of your work, regardless of external validation.

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)

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.

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)

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.

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.

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.

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.

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.

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.

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.

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.

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.

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 "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.