



ORGANIZATIONAL and MANAGEMENT REVIEW

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Executive Summary

The District has been subject to some recent challenges. The previous Council adopted a private enterprise approach to conducting municipal business. One consequence was the departure of over 60 percent of staff over a three-year period; this high turnover impacted the operation, administration, and management in the District.

A new Council was elected in November 2014. The new Council retained 3 of the previous Councillors. The new Council adopted a more widely accepted municipal management approach and developed a new corporate strategic plan which emphasised communication with the community and a 'team' approach to employees. The council also initiated this *Review* of the operations and management of the District.

The *Review* incorporated an inclusive and comprehensive methodology. All employees were invited to participate via a survey and a personal interview. A second principal input to the *Review* was provided by eight similar-sized comparator municipalities within BC. Representatives of these municipalities provided substantial and invaluable background data on various municipal functions, organizational structure, salaries, and work arrangements.

The report of the *Review* is based upon the *RFP Scope of Work* detailed by Council. The report describes the backdrop of governance, and the recommendations support a team municipal management approach to the administration of the District. Several recommendations focus upon governance and the strategic element in management and service delivery.

Council and committee meetings require significant staff support, and the *Review* recommends a reduction in the number through consolidation of committee mandates to ease the burden for Councillors and for staff.

A major finding of the *Review* was the absence of strategic approaches. Many practises had become *ad hoc* and lacked consistency and rationale. Consequently, it is also proposed that Council, through the Chief Administrative Officer (CAO), encourage staff to focus upon the development of strategic approaches to administration and service delivery.

Strategic approaches are required for human resources, project management, information technology, and communications. Although such plans exist within the District, they lack overall coordination with other plans, their purpose or process may be misunderstood by staff, rarely have a champion to ensure smooth implementation, and do not enjoy the wholesale support of

senior management. It is also suggested that a Strategic Change Management Plan is developed to facilitate orchestration of the broad changes required.

It is proposed that these strategic approaches are developed and managed by the Senior Management Team of Directors (SMT). Each project within these strategies should dovetail with the Corporate Strategic Plan of Council and each should be subject to a business case and ongoing monitoring and evaluation. Where relevant, sunset clauses should be included in project plans.

The SMT will represent each of the three proposed divisions: Corporate and Financial Services, Planning and Development Services, and Engineering and Operations Services. The Manager of Communications and the Confidential Secretary to the CAO and Mayor and Council report directly to the CAO. A new temporary position, Strategic Change Management Advisor, will be appointed to lead the implementation of the *Review* recommendations and will report to the CAO. Also, to facilitate the human resources aspects of the change process, a Human Resources Specialist should, on a short-term basis, report to the CAO with close liaison with the Strategic Change Management Advisor. After the recommendations of the *Review* have been fully implemented, the human resources function should be reviewed with a view to identifying its role within the organization. Other changes to the organizational structure are recommended which reassign positions to divisions to more accurately reflect the nature of the work and to ensure optimum contribution to the *Corporate Strategic Plan*.

Working within the *Corporate Strategic Plan*, the SMT and the CAO will serve an enhanced role. The SMT will collectively coordinate the operations and management of the District. The SMT will be expected to provide informed insight and opinion to jointly, in a collegial manner, provide mutual support to the work of the three divisions. The SMT will be expected to develop and to maintain a District administration which becomes an 'employer of choice'.

A principal strategic focus proposed is that of Human Resources. A primary tenet of an effective organization is a human resources strategy which is supportive of employees and provides a rational and consistent competency-based process of selection and performance appraisal. Such a strategy provides a fair and transparent process. This must be balanced with the development of a work place which encourages the concept and practice of wellness. As an adjunct to this, communication between staff and between departments is encouraged as an integral facet of organizational effectiveness. Employees should be kept informed of issues and projects which are relevant to their work.

Currently, although investing much time and effort in their work, staff has a limited sense of contributing to the objectives of Council and the work of the District. Strategic approaches along with communications and employee support will provide focus and orchestration of effort.

Based upon the interviews with personnel and with Council, the review of leading practices and other supportive background, the proposed new strategic approach will allow for long-term guidance and support for staff.

Acknowledgements

The consultants wish to thank Mayor and Council and the personnel at the District for their willingness to actively participate in the *Review*. All interviewees provided reasoned insight concerning the operations and management of the District and constructive observations on where enhancements could be introduced. Many also supplied valuable background follow-up documentation. Several staff, including the Directors of the departments and the Executive Assistant to the Chief Administrative Officer, provided extraordinary assistance in the coordination of the *Review* and in responding to multiple requests for background materials.

The representatives of the comparator communities kindly spent time gathering data and completing the surveys. The information which they provide was a significant contribution to understanding how Sechelt compares with other municipalities. The contributing municipalities will receive the comparator information in aggregated form.

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1 Background and Context¹

The Village of Sechelt was incorporated in 1956. Sechelt later expanded its boundaries in 1986 with the inclusion of a number of adjacent unincorporated areas. Sechelt is a district municipality (the District); Sechelt is within the territory of the Shishalh Nation; neighbouring jurisdictions include the the Sunshine Coast Regional District (SCRD), the Sechelt Indian Government District, and the Town of Gibsons.

Sechelt offers a full range of municipal services with the exception of those provided by the SCR D under servicing agreement arrangements. Fire services are provided by the Sechelt Fire Department, an Improvement District (Sechelt Fire Protection District) established in 1966. Police services are contracted to the RCMP.

The District currently has 51 active employees working in Municipal Hall, Parks, Public Works, Wastewater Treatment, and the RCMP detachment. Of the 51 staff members, 43 are in the bargaining unit (BCGEU) and eight are excluded employees. Of the bargaining unit members, six are temporary employees and 37 have permanent status. As of January 2015, there is one vacancy in a bargaining unit position (Facilities Maintenance Technician), and three excluded positions are either vacant or filled on a short-term basis (Deputy Director of Development Services, Director of Development Services, and Chief Administrative Officer). The GIS Technician and Planning Technician are temporary bargaining unit positions. The elimination of the Deputy Director of Development Services and the addition of 3.3 new positions are proposed in the 2015 Budget. The budget has recently been adopted by Council. The 3.3 positions remain vacant pending the outcome of this review.

The District has had significant governance shifts over recent years, including a recent Council that adopted a 'government as business' model. As a result, there was considerable turnover in staffing evidenced by over thirty people rotating through the organization over the past thirty months. Since 2012, there has been considerable personnel change at senior staff level; four Chief Administrative Officers (CAOs), the current interim CAO, two Chiefs of Innovation and Growth (CIG), three Chief Financial Officers (CFO), and three Corporate Officers (Clerks). The Sustainability Manager position has been left unfilled. In addition, numerous staff positions have experienced a similar lack of stability.

¹District of Sechelt RFP January 2015 Section 1

1.1 Structure of the Report of the Review

There are two parts to the Report of the *Review*. This, the major part of the report, addresses the outcomes of the *Review* based upon interviews with personnel, examination of documents from the District, information provided by other jurisdictions, reviews of 'leading practices', and the experience of the consulting team.

The second report, *Confidential Report to Council*² addresses personal and personnel matters such as salaries, contracts and employment arrangements with staff, and other confidential matters identified by Council. Most of this report is based upon examination of District documents and comparison with information from other municipalities.

Following the introductory sections, such as Executive Summary and Methodology, the structure of the Report follows the outline of the *RFP Scope of Work*. The decision to place recommendations (and the attendant supporting narratives) in one chapter versus another is somewhat arbitrary. Many of the recommendations are strategic, many will contribute to the effectiveness and efficiency of the organization, and many address matters of human resources. The two principal strategic issues, 'governance' and 'strategic change plan' are placed in the opening Strategic Priorities' chapter. 'Governance', largely addressing the work of Council, provides the backdrop against which other management, administrative, and operational decisions and actions are conducted. The *Strategic Change Plan* is addressed earlier as this will facilitate, strategically, the orchestration of the other proposed changes in subsequent sections.

Most of the other recommendations are assigned to either 'Human Resources' or additional initiatives supportive of the *Corporate Strategic Plan*.

Other sections refer to specific items in the *Scope of Work* such as the development of a policy or the drafting of employment contracts.

Each section culminates in a brief description of 'Findings' and the consequent Recommendation(s). The recommendations are numbered sequentially through the report and are also gathered at the end of the report³.

²*Freedom of Information and Protection of Privacy Act*, Sections 13 and 22

³See chapter 7, page 60

2 Methodology

2.1 Process

To provide a comprehensive analysis to address the required *Scope of Work*, the following methodology was adopted.

- *Initial meeting with District staff and Council*
The Consultants attended the bi-monthly staff meeting⁴ to inform personnel of the mandate of the *Review* and the proposed methodology and underscored the desire to ensure an objective, comprehensive, and inclusive review.
- *Employee survey*
A pre-interview survey was developed to solicit the views of personnel and Council. Although addressing common themes with several identical questions, the survey content was oriented to the particular interests and experience of three groups: Council, exempt employees, and union employees.⁵ Respondents were asked to use the survey as a guide to the interviews to be held with the Consultants and then to forward the completed surveys to the Consultants for further analysis.
- *Council and employee interviews*
Every councillor and every exempt and unionized member of staff were invited to be interviewed by the consultants. All six Councillors were interviewed along with 51 of the 55 exempt and unionized staff. Of the three not interviewed, one was on maternity and another on stress leave, and the other was part of a group discussion which the employee considered adequate personal input to the *Review*. The interview format followed the structure of the hard copy survey. Follow-up questions for clarification or for documentary background were submitted to respondents, as required. As the *Review* was considered to have, primarily, an internal District focus only three external stakeholders⁶ were contacted to solicit views on the nature and quality of the work relationship with the District.
- *Survey of comparator municipalities*⁷
To place the data concerning the District into a broader context, eight BC municipalities were selected as comparators based, primarily, upon population. Although 'population' is a somewhat limiting factor, a principal goal was to review the range of services provided along with attendant costs. The survey was emailed to each CAO and addressed

⁴The bi-monthly lunch-time meeting of all staff was introduced by the previous administration. The newly-appointed temporary, CAO continued the practice. Occasionally, Councillors attend the meetings.

⁵See Appendix 2.1 for the surveys

⁶Sunshine Coast Regional District, Sechelt Indian Government District, RCMP

⁷ See Appendix 2.2 for the survey format

services provided, number of employees, and salary levels⁸ along with quantitative data to facilitate comparison of relative workloads and municipal responsibilities.

- *Document examination.*

Requests for relevant documents were submitted, on an ongoing basis throughout the *Review*, to either the District's administrative coordinator for the *Review* or to the employee who was directly responsible for the functional area to which the document related.

2.2 Comparators

The *Review* identified eight comparator BC municipalities⁹ based on populations which averaged 11,100. Table 1 summarizes the information compared, Table 2 summarizes the comparisons, and Table 3 includes the comparison of services delivered. .

Table 1 Sechelt Data for Comparisons

General questions for Statistical Comparisons for 2014 ¹⁰	
Population 2014 not available (2011)	9291
Paved roads in kilometers (2013)	107
Water lines in kilometers	Not applicable, zero
Sanitary sewers in kilometers (2013)	51
2014 debt amortization	602,970
2014 total reserve funds including utilities	13,572,462
2014 budget expenditures including operation, capital, debt and contracted services	35,456,840 ¹¹
2014 average residential property tax assessment	383,400
2014 1% tax generation in \$	60,000
2014 total payroll \$	4,497,295
2014 total payroll overtime \$	64,093
2014 FTEs – Full-time and Part-time	Full-time 55 Part-time 0
2014 number of exempt positions	10

⁸ Although a 'service' might be provided by a municipality, some services are provided 'in-house others via contract.

⁹ Comox, Ladysmith, North Saanich, Parksville, Qualicum Beach, Sidney, Sooke, View Royal

¹⁰ This figures includes capital expenditures of \$18M

¹¹ Data from District, this includes capital of \$18m. for Waste Water Facility

Table 2 **Comparator Municipalities**

Comparator Municipalities									
Municipalities	#1	#2	#3	#4	#5	#6	#7	#8	Sechelt
Population	Average 11,100								9291
Paved roads Ave. 90 km ¹²	181	96	65	76	45	51	106	98	107
Water pipes Ave. 107 km	200	99	71	58	112	NA- RD ¹³	100	NA-RD	NA-RD
Sewers Ave. 73 km	84	77	56	44	102	52	96	73	51
2014 debt amortization per capita Ave. \$34	\$42	\$16	\$60	No debt	\$24	\$12	\$48	\$66	\$65
2014 reserve funds per capita Ave. \$883	\$813	\$2325	\$1221	\$306	\$552	\$755	\$538	\$555	\$1461
2014 expenditures ¹⁴ per capita Ave. \$2064	\$1807	\$2583	\$2804	\$1967	\$1897	\$2037	\$1993	\$1427	\$3817
2014 resident' prop' tax assess ¹⁵ Ave. 409	692	295	285	390	427	505	347	335	383
2014 1% tax generation Ave. 81K ¹⁶	87	106	70.8	71.1	102	60	85.8	61.8	60
2014 total payroll per capita Ave. 418	\$407	\$433	\$554	\$587	\$586	\$239	\$337	\$203	\$484
2014 total overtime as percentage of payroll Ave. 1.8%	2.2%	1.6%	1.3%	2.8%	1.4%	2.7%	0.5%	NA	1.4%
Residents per FTE ¹⁷ 2014 Ave. 245	295	176	147	171	149	368	231	424	169
Residents per exempt staff Ave. 1089	1107	706	839	1286	644	1206	853	2072	929

¹² Averages do not include Sechelt¹³ The services are supplied through the regional district¹⁴ Includes operations, capital debt, and contracted services¹⁵ Average residential property tax assessments in thousands of dollars¹⁶ In thousands of dollars¹⁷ For the purposes of this calculation, the small numbers of PTEs are calculated as two PTEs = one FTE

Table 3 Services Delivered Comparisons

Services Delivered Comparisons									
Municipality	#1	#2	#3	#4	#5	#6	#7	#8	Sechelt
Services	Delivered by Municipality (M), Regional District (RD), Contracted (C), Other (O), or Not Provided (blank)								
Water treatment	M	M	M	M	RD	RD	RD	RD	RD
Waste water treatment	C	RD	M	RD	RD	RD	RD	C	M
Storm drainage	M	M	M	M	M	M	M	C	M
Garbage collection		RD	M&C	M	C	C	C		C
Recycling program		RD	M&C	RD	RD	RD	C		C ¹⁸
Road and ditch maintenance	M	M	M	M	M	C	M	C	M
Sidewalks maintenance	M	M	M	M	M	C	M	C	M
Street lights	M	M	M	M&C	M	C	C	C	C
Parks	M	M	M	M	M	M	M	C	M
Recreation facilities	C	RD	M	RD	O	O	M	RD	RD
Community hall		M	M	M	O	O		O	M
Cemetery		O	M	M			RD		RD
Emergency planning	M	M	M	M	M	M	RD	M	RD
Fire service	M	M	M	M	M	M	M	M	C
Police service	C	C	C	C	C	C	C	C	C
Arts and culture	C&M	M	M	M&C	O		M&R D		M&C ¹⁹
Library service	C	M	M	C	O	O	O	O	O ²⁰
Other - see below									

Summary²¹

Municipality #3 also offers added services as follows:

- Animal Control (contract dog control)
- Building Inspection
- By-law Enforcement
- Economic Development and Tourism (in conjunction with CVRD)
- Environmental Sustainability

¹⁸ Contracted, only administration is done by Sechelt

¹⁹ Contracted under direction of District

²⁰ Reg. Library Board

²¹ Caution should be used in examining these data. Without detailed analyses of the comparator worksites it is not possible to determine exact equivalent numbers. Geography, population density, income, priorities in service delivery, and some services being delivered through regional districts and other organizations will cause some distortion. However, notwithstanding these challenges, the tables provide a broad background to the *Review*

- Heritage and Revitalization, Museum
- Land use planning and development including subdivision approvals
- Transit and Trolley (contract with BC Transit)
- Watershed Management

Municipality #4 also manages the airport.

Municipality #5 offers added services provided by municipality:

- Driver Services
- Sewer collection
- Water distribution

Municipality #6 also provides services for

- Animal control (through Regional District)
- Sanitary Sewer Collection

Sechelt's debt amortization per capita of \$65 is higher than the average of \$34 and is the second highest in the group; however the reserve funds per capita of \$1461 are the second highest in the group where the average is \$883. The total payroll of \$484 per capita is the fourth highest and higher than the average of \$418. It should be noted that these figures do not account for any adjustments made in 2015 as a result of any major capital expenditures.

The overtime costs of 1.4% of total salary costs is the third lowest and lower than the average of 1.8%. The population per FTE 169 is the second lowest and below above the average of 245. The ratio of population to exempt staff of 929 is slightly below the average of 1089 and is mid-range in the group.

Key services may differ from municipality to municipality. Sechelt does differ significantly from the comparators as they provide fewer direct services than seven of the eight for water, recreation, fire and emergency planning. However, this could impact the calculations for the various comparables for FTEs and ratio for exempt staff per capita. Sechelt, of course, also manages the airport which only requires nominal resources related to managing tasks such as fuel contracts. The following lists the service delivery of the comparators in which only one municipality provides fewer direct municipal services than Sechelt:

- Water Service not operated by Sechelt
 - Four comparators provide services and four through the regional districts.
- Waste Treatment operated by Sechelt
 - Four comparators provide services and four through the regional districts
- Storm Drainage operated by Sechelt
 - 7 of 8 comparators are operated by the municipalities
- Garbage Collection contracted

- 7 of 8 comparators are contracted
- Recycling municipal administration but contracted out
 - all comparators contracted out
- Street Lights contracted out
 - 4 of 8 comparators contracted out
- Parks operated by Sechelt
 - 7 of 8 comparators are operated by the municipalities
- Recreation through the Regional District
 - 4 of 8 comparators are operated by regional districts, 2 share with their regional districts
- Community Halls operated by Sechelt
 - 4 of 8 comparators are municipally operated, other 2 are managed by other
- Cemetery through the Regional District
 - 2 of 8 comparators are municipally operated, 6 by others by other jurisdictions
- Emergency Planning through the Regional District
 - 6 of 8 comparators are operated by regional districts
- Police contracted service with the RCMP
 - all comparators contracted service with the RCMP
- Fire Service contracted to the Improvement District - unique
 - all comparators are municipally operated
- Arts and Culture municipally operated through two contract positions
 - 4 of 8 comparators are municipally operated or contracted out
- Library Service contracted to Library Board
 - 7 of 8 comparators contracted to boards, one municipally operated

3 Strategic Priorities

Introduction

In the course of the *Review*, the need for two important strategic priorities became apparent. First, being a relatively new Council, it is proposed that the operating philosophy and practice of governance in Sechelt should be communicated more clearly. This will provide an important backdrop for other changes anticipated within the District. Second, given the complexity of those changes, the *Review* recommendations should be subject to an overall plan. It is necessary that the development and implementation of the proposed changes are orchestrated in a measured fashion.

Later in the report, two associated recommendations are proposed. First, a temporary position of Strategic Change Management Advisor should be introduced to manage the complex changes. Next, the enhanced responsibility and function of the Senior Management Team is discussed and, most importantly, the role of the group as the directors of strategic change.

3.1 Governance Moving Forward

In British Columbia councils obtain their authority and jurisdiction from the *Local Government Act (RSBC 1996)* and the *Community Charter (SBC 2003)*. Municipalities and their councils are recognized as an order of government within their jurisdiction that is democratically elected, autonomous, responsible and accountable to the residents of their communities.²²

The purpose of a municipality includes:²³

- providing for good government of its community
- providing services, laws and other matters for community benefit
- providing for stewardship of the public assets of its community
- fostering the economic, social and environmental well-being of its community

The municipality has the capacity, rights, powers and privileges of a natural person of full capacity and may provide any service that the council considers necessary or desirable, and may do this directly or through another public authority or another person or organization. Council members embody the public welfare of their communities which translates as balancing their vision with the concerns expressed by the people and the organization affected by their decisions.

²² *Community Charter*, Principles of Municipal Governance, Section 1

²³ *Community Charter*, Municipal Purposes, Section 7

The Sechelt Council comprises a Mayor and six Councillors, who were elected for a four-year term commencing in December, 2014. The Mayor presides at Council meetings and provides leadership to council, including recommending bylaws, resolutions and other measures that may assist in good government of the municipality. Councillors' key responsibilities include:

- consider the well-being and interests of the municipality²⁴
- contribute to the development and evaluation of the policies and programs of the municipality respecting its services
- participate in council and committee meetings and meetings of other bodies as appointed
- carry out other duties assigned by Council, as defined under the *Community Charter*.

The newly-elected Council has developed a traditional Council-CAO system of governance. This is the predominant form of municipal governance in Canada and is employed by all the benchmark municipalities referenced during the course of this *Review*. This was not the model used by the previous Council which appointed a Manager of Growth and Innovation to oversee the day-to-day operations of the municipality and was focused on a business approach rather than public sector model.

The CAO is responsible for leading the administration and day to day operations of the organization as well as carrying out the policies established by Council which include the Corporate Strategic Plan. Council can execute its authority only by resolution or bylaw. To assist with the decision-making process, Council may appoint committees to research and provide recommendations for consideration. The *Community Charter* provides for a Committee of the Whole which is full Council, Standing Committees appointed by the Mayor with at least half of the committee comprised of council members, Select Committees which must have at least one member of Council, and Advisory Committees which do not require representation from Council.

The Sechelt Council has adopted a hybrid governance model using a variety of forms of committees and a *Committee of the Whole* to assist it with decisions. The Mayor has appointed three Standing Committees:

- Finance, Culture, and Economic Development
- Planning and Community Development
- Public Works, Parks, and Environment

In addition, Council has appointed seven Advisory Committees comprising:

- Advisory Planning
- Accessibility
- Airport Development
- Community Investment and Program Grant Review
- Downtown Revitalization

²⁴Community Survey

- Finance
- Human Resources

Members of Council also sit on a number of committees for other organizations and agencies. Council has also agreed to incorporate *Committee of the Whole* meetings which are less formal and would allow for opportunity for input from the public on key issues and projects under consideration. Council has scheduled, during 2015, 23 regular meetings, 36 standing committees, an estimated 25 special and In Camera meetings and advisory committees which could involve 25 to 50 meetings.

All of these meetings must be conducted in accordance with the *Community Charter*²⁵ requiring proper public notice, agendas, and minutes. This requires considerable staff resources to support these meetings, notwithstanding the hours required by Council to attend. This puts considerable strain on Council. In addition, staff has other statutory and operational responsibilities.

Mayor and Council have begun to address the establishment of a “team” approach to governance and to communicate with and be transparent to the community. Interviews in the course of the *Review* suggested that members of council are committed to good governance principles including respecting opinions, providing for effective meetings, developing a clear vision for the organization, understanding their roles and responsibilities, setting realistic priorities, and developing a good working relationship with staff.

Most members of Council acknowledge they would benefit from a better understanding of municipal functions. Some recognized the need for additional orientation and training to enhance their ability to provide strong ethical leadership to the community. Council has recently adopted a new *Corporate Strategic Plan* for 2015 – 2018 which establishes a key goal for developing “effective governance” by “operating a high quality and effective local government where residents have confidence and trust in Council and staff’s management, planning and decision making”. In order to reach this goal, Council members acknowledge there is need to clearly articulate the vision to staff and the community, and to work collectively in developing a trusted and respected approach to developing an effective organization.

Interviews demonstrated that members of Council have a range of opinions and perspectives on what constitutes good municipal governance but all agree to be effective Council and staff must have a good relationship. Council members acknowledge they need to improve their collective governance effectiveness. Such consensus is positive. Council did identify frustration with the

²⁵Community Charter, Section 127

meeting agenda process in that there appear to be too many late items on agendas which does not give them adequate time to review prior to making a decision.

Findings

The work of Committees is time consuming for Council members and for staff. The mandates and the number should be evaluated to determine if some can be eliminated and others consolidated. Specific select committees can be established to deal with specific issues under consideration, as required, and when recommendations are made to Council the committees would then be dissolved.

Public opinion and consultation can be complex. While Council is to be commended for its commitment to public consultation and engagement, it will require the balancing of vociferous and often contrary opinions. It also needs to be cognizant of the fact that public engagement and consultation inevitably lengthen municipal decision-making process and requires additional resources.

As Council has a number of new members, it is important to clearly identify roles and responsibilities for the Mayor, Council, and staff and ensure that policy development by Council is implemented by staff in an effective and timely manner.

Recommendations

1. Council review its committee structure and terms of reference to determine if some committees can be eliminated and others consolidated to reduce the work load of both Council and staff.
2. Council and staff conduct an annual joint workshop on governance and organization effectiveness to determine how effective they are working together and what areas may need to be improved upon.
3. Council develops an annual self-audit system to evaluate if it is functioning effectively using good governance principles and, if not, develop appropriate corrective action to improve effectiveness.
4. Council provides an annual budget for Council specifically directed to training and development.

5. Council meets a minimum of twice annually to review the strategic plan with the CAO and senior staff and discuss key issues that may be facing the municipality.²⁶
6. Council develops a performance management system for the CAO and meets annually to review his or her performance and development.
7. Council and senior staff develops a joint *Code of Ethics and Conduct* to help guide their conduct recognizing their allegiance and loyalties are to the community as a whole and not to individuals or groups.
8. Council and senior staff reviews the procedure bylaw and agenda procedures to determine what changes and improvements can be made to ensure agendas are prepared with adequate information and in a timely manner for Council to review before making decisions.

3.2 Change Plan

Public service managers, and administrative and line-staff must be prepared to be aware of, and consider, various options to address public service demands. There is interdependence with other organizations in meeting service demands. This interdependence provides both competition and opportunity.

To address the evolving nature of public services, municipal organizations must use the skills of staff and understandings of the particular service environment to engage strategies that are geared to address and to fund service demands. Municipal government must think strategically and encompass these initiatives into a comprehensive strategic change plan. Lastly, municipal government must prepare the groundwork for the change process such that personnel are equipped with the skills and attitudes to adopt and support the implementation of the plan.

3.3 Changes in the Sechelt Context

An overriding issue raised in interviews was the support for change. Staff identified a range of process outcomes which were not supportive of either an effective service to the community or a workplace which was conducive to employee wellbeing. These perspectives were also reflected in interviews with Councillors. The election of a Council with three new councillors and mayor, the development by Council of a short term strategic plan, the appointment of an interim CAO, and

²⁶ Differs from 2 as this is focussed upon the identification and discussion of community issues versus the effectiveness of management and governance.

the conduct of an inclusive review were noted by interviewees as mobilisers for acceptance of the initiation of change. Consequently, a primary foundation of successful change, consensus and support, is evident within the District.

Findings

With regards a process of change within Sechelt, four principal issues arose in response to ‘what should change’.

- The need for the District to change its structure to more effectively address the particular service demands.
- The selection and evaluation of personnel with the skills to manage the service and funding challenges.
- Encouragement of a learning organization²⁷ which facilitates the opportunities for personal development and continual learning for personnel.
- Public transparency and customer service excellence.

Given the need to introduce these initiatives, a strategic change plan should be developed to ensure a smooth transition. In summary, there should be five elements to the strategic change plan.

- The articulation of the vision for those actions or initiatives which form the basis for the organizational change.
- The principal phases of the change process articulated to identify the series of sub-goals along with a timetable of actions.
- The composition of the change team or the principal, Strategic Change Management Advisor, responsible to orchestrate the changes.²⁸
- The expected results such that all personnel can recognise the intended results and the stages required to reach that objective.
- Communication of the plan, in a consistent way, to facilitate mobilisation of staff and to maintain momentum throughout the change process.

There are two crucial elements to the viability and success of the Change Plan: the selection of the Strategic Change Management Advisor and, second, the development and communication of the plan and constant monitoring of the progress by the SMT.

²⁷ See, P. Senge, *Fifth Discipline; Strategies and Tools for Building a Learning Organization*, Random House, 1990

²⁸ Elsewhere in the Report, proposals have been made for the limited duration appointment of a ‘Strategic Change Management Advisor’ and the importance of the role of the Senior Management Team as orchestrators of the change plan.

3.4 Strategic Change Management Advisor

The Strategic Change Management Advisor will develop and implement the strategic change management plan which optimizes the opportunity for adoption through employee engagement and, at the same time, minimizes risk for the District. The plan should incorporate a comprehensive communication plan and, where necessary, the reassignment, training and hiring of staff. Where possible and appropriate, existing staff will receive training which supports process changes and the implementation of technology and enhances the quality of the workplace. The Strategic Change Management Advisor will develop and orchestrate target measures to monitor and ensure new processes and technologies address the identified District needs and goals as identified by Council.

The SMT will play an important role in the support of the Strategic Change Plan and the communication of objectives, the detailing of its application within each Department and progress reports to staff. Enhancements to the approaches of the SMT are discussed elsewhere in the Report.²⁹

3.5 Communication of the Strategic Change Plan and Progress

The development and introduction of a Strategic Change Plan is an important factor in the ability of the District to develop and implement municipal strategic priorities and position the organization for the future, to introduce changes to the organization structure and reporting relationships, and to create the 'next steps' in building organizational capacity and effectiveness.³⁰ Consequently, the Strategic Change Plan should be accompanied by a communication plan focused upon the change process.

The Communications Plan is an important component of the Strategic Change Plan for the following reasons. The Communication Plan will inform all personnel of:

- the vision of the plan and the necessity of change and the process of management of change
- the steps required to bring the vision to fruition and the role of staff in working on those tasks
- the progress of change and any amendments to the Plan and the reason for the amendments
- the opportunities for personnel development for staff to address the change requirements

²⁹See Section 4.3

³⁰See RFP, 4.1

- the avenues for support in case personnel are uncertain of expectations or require clarification of their role in the change process
- the explanations and reinforcement of the expectations of staff required to meet the demands of change
- on-going progress reports to Council concerning the status of change.

The Communications Plan is intended to encourage two-way communication between the facilitator of the change and the personnel who are responsible for its implementation.

Recommendations

- 9 A Change Management plan should be developed and implemented which addresses the governance, organizational, management, administrative, and operational changes identified in the Report of the Review and approved by Council.
- 10 As a component of the Strategic Change Management, a communications plan should be developed which explains to staff, and the community, the anticipated process and timing of the changes

4 Organizational Structure

4.1 District Organization Structure

The *Review* identified a structure, consistent with the functions and services of the District, comprising three divisions led by directors³¹. As part of this *Review* the Consultants were asked to analyze the results of the interviews with Council and staff and make comparisons with other municipalities along with best public and business practices to determine the most appropriate structure and reporting relationships. The consultants also examined municipal comparables to benchmark service delivery models including number of employees and contractors and to make recommendations on any modifications to current structure and how to build capacity within the organization. Eight comparable municipalities were selected as noted in 2.2 above.

4.2 Sechelt in Context

Sechelt, like most other municipalities, delivers local services through its own workforce or by contract to other jurisdictions or to other agencies, such as the RCMP, or to private companies for services such as waste collection. The schedule above³² depicts the services that are delivered by the District of Sechelt.

The current organization structure has evolved over a number of years under the direction of a number of CAOs. The CAO ensures that the policies, programs and other directions of Council are implemented using resources available and is responsible for determining the most effective and efficient means of delivering the services and programs to the community. The current structure has a number of functions that are defined within various departments within the organization charts shown in the Appendix³³.

The current structure has four distinct divisions with each headed by Directors. Managers oversee the service delivery of an array of functions. The four divisions are:

- Corporate Services
- Financial Services
- Development Services (Includes Planning)
- Parks and Public Works Services (Includes Waste Water Treatment Facility)

Over recent years there has been a tendency by the Provincial government to download more services to local government including environmental and flood plain regulations. This has

³¹See page 25

³²See Table 3, page 11

³³See page 63 and following

required the development of technical expertise and innovation to ensure services are maintained and risk is minimized to the community.

Transformation of the organization, as outlined in this report, will require the establishment and implementation of a broad strategic change. This will encompass development of a human resources strategic plan to prepare an effective workforce to deliver quality services through the municipal workforce. Other initiatives could include negotiation of partnerships with the neighboring jurisdictions like the Sunshine Coast Regional District and the Shishalh Nations. These initiatives may include human resources services, information technology, waste water treatment, or geotechnical services.

Findings

The consultants determined the following findings concerning strategic direction and the organizational structure required to deliver services:

- Departments/sections are functioning as silos with limited cross division and department communication or sharing of information
- No collective vision and focus for the personnel
- No common direction with the result that staff and departments are not unified in a common approach
- Limited strategic decision making at senior management team level
- Difficulty in sharing operational and management information and best practices
- No Business Case Analysis or peer reviews of corporate initiatives
- Frustration resulting in low morale and high turnover of staff
- Low work expectations and lack of accountability for activities and functions
- Staff resources not balanced throughout divisions nor equally shared to maximize effectiveness
- Lack of collaboration across departmental boundaries
- Lack of knowledge in staff regarding what is a priority and core responsibility
- Multiple uncoordinated points for liaison with stakeholders and signing and monitoring of contracts
- Low employee morale – lack of recognition
- Lack of professionalism and code of conduct
- Limited separation between governance and operations and service delivery under previous administration

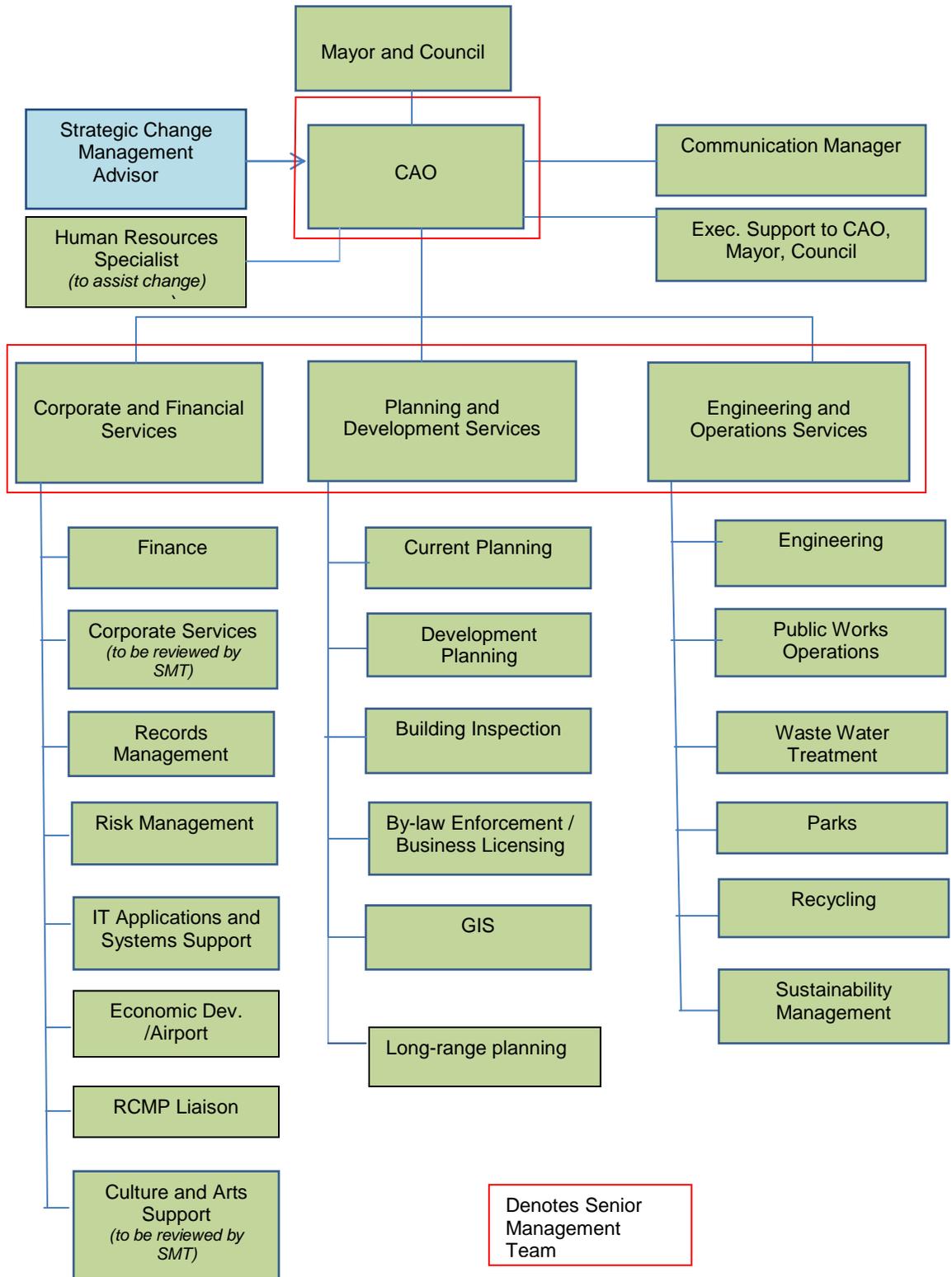
The current organizational structure is not the best arrangement of functions to address the anticipated service needs of the district.

4.3 Proposed New Structure

The Consultants reviewed the current organization structure to determine if “form follows function” in providing both internal and external services. Along with comprehensive interviews, literature review, comparative municipalities were researched along with information collected from District documents to provide an in-depth understanding of the current and prospective organizational structure to facilitate exemplary service delivery.

The proposed changes will streamline the organization and provide for opportunity for high level decision making by the Senior Management Team utilizing structured cross-departmental work teams in developing policy and procedures. The new proposed organization structure is detailed by functional area below.

Proposed structure



The key and notable changes including recommendations are as follows:

- The new structure provide for three distinct divisions:
 - Corporate and Financial Services,
 - Planning and Development Services and
 - Engineering and Operations Services.
- Each division will be led by a director; these positions will be subject to new titles.
 - Director, Corporate and Financial Services
 - Director, Planning and Development Services
 - Director, Engineering and Operations Services
- The current positions of Director of Corporate Services, the Human Resources Advisor and Superintendent of Public Works will be eliminated.
- The Manager of Communications and the Confidential Secretary to the CAO and Mayor and Council report directly to the CAO.
- A new position, Strategic Change Management Advisor, will be appointed to lead the implementation of the *Review* recommendations reporting to the CAO. This will be a limited term position as required for the implementation of the proposed organizational changes.
- A Human Resources Specialist³⁴ will be appointed and will, temporarily, report to the CAO to facilitate HR changes during the transition. Following implementation of the Change Plan based upon Council's schedule, the HR function will be reviewed by Council and SMT to determine the optimal way to address the range of HR tasks required within the District organization. The current Corporate Services function³⁵ will be combined with Financial Services.
- The Bylaw Enforcement and Business Licensing function to be transferred from Corporate Services to Planning and Development Services.
- The Arts and Culture function³⁶, under Corporate and Financial Services, with the two contract positions of Arts Coordinator and Festival Producer should be combined. The Council is developing a Culture and Arts policy and the connection with economic development within Sechelt. When these discussions are concluded there are then two options for the Arts and Culture function.
 - The appointee could remain as a contract position with the attendant savings in matters such as benefits, or

³⁴ It is feasible, given the skills of the incumbent, that the responsibilities of the Human Resources Specialist could be combined with those of the Strategic Change Management Advisor, above

³⁵ Subject to discussion by SMT

³⁶ Subject to discussion by SMT

- The position could be considered to be a full-time or part-time employee position in support of the Councils increased emphasis upon culture aligned with economic development.
- That the Parks and Public Works functions report directly to the Director of Engineering and Operations.
- The Waste Water Treatment Coordinator, a contract position, is eliminated.
- That the Deputy Director of Development Services position be replaced with a Senior Development Planner position.
- A new position of Current Planner position is created.
- That one of the staff in Public Works department is a level 4 and lead-hand to meet new operational requirements regarding the Waste Water Treatment Plant.
- That the District continues to contract temporary positions, such as Special Development Planners and Building Inspectors, to assist with high demand cycles for development and building construction.
- An Implementation Committee comprised of SMT, including the CAO, a representative of Council, a representative of the BCGEU and the Strategic Change Management Advisor should be established to advise and oversee the proposed changes. Both the timing and the form of the proposed changes will be subject to the decisions and direction of Council and the SMT and the timely recruitment/selection of management personnel.

The SMT, comprised of the three divisional Directors along with the CAO as Chair, will assume responsibility for the orchestration of activities and decision-making within the District organization based upon the directions of Council. The Directors will manage their respective divisions and support the work and personal development of staff and workplace wellness. They will provide mutual support to other divisions and will research and supply the necessary information and support to the CAO such that the District is managed effectively and efficiently. It will be an active, participative and effective committee. The objective is for SMT to be a convergence of focus in providing a service to the community and buttressing a quality workplace.

Recommendations

- 11 The new organizational structure should be implemented comprised of three divisions, with the attendant changes in personnel/organizational positions.
- 12 A Strategic Change Management Advisor should be appointed, for a limited term for the duration of the strategic change plan, to work in concert with the CAO and SMT.
- 13 An Implementation Committee should be introduced to work in concert with the CAO and the SMT for the duration of the Strategic Change Plan. The Committee should include representation from Council, the Strategic Change Management Advisor, Senior Management, and exempt and unionized personnel.

5 Human Resource Issues

5.1 Contract Review

An examination of all senior employee contracts and consulting contracts was conducted and recommendations made for standardized format and contract terms based upon leading practices. Given the confidential nature of this portion of the *Review*, this section is detailed in the *Confidential Report to Council*.

5.2 Job Descriptions: CAO and Director of Development Services³⁷

These two position descriptions are important for review as both are held by interim staff and scheduled to be advertised for replacement. Following the research conducted for the *Review* and the subsequent recommendations for changes, other position descriptions may also require revision. The *RFP Scope of Work*, however, only required that the CAO and Director of Development Services are reviewed and revised. Given the findings of the *Review*, the role of the Director of Development Services has been expanded to include 'Planning'. This is reflected in the position description detailed below.

Given the breath of changes along with the ongoing legislative, management and operational responsibilities of personnel, it is proposed that the position of Strategic Change Management Advisor is established. This will be a temporary position of, approximately, 18 months to 2 years.³⁸ The term of the engagement is dependent upon the detailed schedule of the strategic change plan. Given the importance of this role in the successful implementation of change within the District, a proposed position description is detailed below.

5.2.1 Chief Administrative Officer

Position Summary

The Chief Administrative Officer (CAO) is appointed pursuant to the Community Charter and is an officer of the municipality. As senior municipal administrator, the CAO is required to work within the legislated mandate of the District and provides organizational leadership to municipal staff. The CAO is responsible for implementing the policies of the District Council including assisting Council and community members to define and implement the vision and strategic plan for the community. As such, the CAO is the principal advisor to Council in the development of public policy. This position is responsible for the administration and delivery of services to the

³⁷In the proposed new organizational structure the role of the Director of Development Services has been expanded to include 'Planning'

³⁸Neither the ability nor the availability of current staff to develop and implement the components of the change process has been determined. In addition, council and SMT must decide the detail and process of change.

municipality's residents and businesses through effective use of municipal resources.

Without limiting the generality of the foregoing, the Chief Administrative Officer's duties shall include the following:

Council

- To ensure, in accordance with the *Local Government Act* and the *Community Charter*, the policies, practices and procedures specified by the Council are being observed and carried out.
- To consistently inform the Mayor and Council regarding all important municipal matters including status of programs, initiatives and financial position.
- To maintain a thorough working knowledge of provincial legislation and regulations that affects the policy decisions of Council.
- To advise and assist in developing municipal policy and a strategic plan.
- To attend meetings of Council and Committees as required; provide advice to Mayor and Council on agenda items as required.
- To see that Council action resolutions are carried out and to report thereon.
- To assist in the preparation of appropriate business cases and other documents needed to enable Council members to fulfill their functions; ensure that Council receives staff reports on agenda items to provide a background, technical analysis, costs, alternatives, and a recommendation sufficient for Council to make informed decisions.
- To submit proposed contracts and leases to the Council for approval.

Community

- To develop and maintain liaison with community leaders, officials, stakeholder groups, agencies, and government departments to assist Council and promote the interests of the District.
- To ensure that effective public relations are maintained by communicating information on the actions and decisions of Council to the general public through appropriate channels, e.g., media, website.
- To ensure the effective utilization of the District's resources: financial, physical, and people.
- To determine that all practical economics are being adhered to throughout the Municipality consistent with best use of the facilities being achieved.
- To administer superior delivery of public services to the citizens and businesses in the District of Sechelt.

Employees

- To lead the organization to achieve its vision and strategic goals in line with the core values and business plans that define our municipal organization.
- To recommend to Council organizational structure for efficient and improved service delivery to the public and changes thereto and when approved, to see that they are implemented and adhered to.
- To direct the work of Division and Department Heads to ensure the implementation and execution of Council policies and public service delivery in accordance with Council's budget and business plan.

- To ensure that employees under the Chief Administrative Officer's jurisdiction, as per the organizational chart, are delegated adequate authority but that the appropriate limitations on such authority are explained and are clearly understood.
- To exercise management responsibilities over all Municipal Employees, including the exercise of the powers to employ, discipline or dismiss employees where so provided with this power by Municipal bylaw. In the case of unionized employees the responsibilities will be carried out in accordance with the procedures outlined in the relevant collective agreement.

Responsibility

- The Chief Administrative Officer may delegate portions of his/her authority and responsibility to appropriate officers of the Municipality, but he/she may not delegate or relinquish overall responsibility for results nor accountability to the Council for the performance of the Chief Administrative Officer's duties.
- The Chief Administrative Officer shall be authorized to take any reasonable action necessary to carry out the responsibility delegated to him/her so long as such action does not deviate from established Municipal policy or exceed the specific limitations placed on his authority by the Council.
- Notwithstanding the above, it is recognized that certain Municipal Employees have statutory duties and it is recognized that those specific employees shall be directly responsible to Council for statutory duties only.

Required Knowledge and Skills

- Thorough knowledge of District Departments, Council and Committee functions, procedures and the processing of District transactions.
- Thorough knowledge of the *Local Government Act*, *Community Charter*, other Acts, government regulation, Policies and Bylaws concerning District and local government activities.
- Comprehensive knowledge of responsibilities related to municipal government administration.
- Thorough working knowledge of Provincial Legislation and Regulations that affect the policy decisions of Council and ability to provide opinions on same.
- Sound knowledge of advanced business management principles and best practices.
- Demonstrated knowledge of the District strengths, opportunities, challenges and culture.
- Excellent interpersonal and communications skills and ability to deal with people in a professional manner
- Possess superior organizational skills and the ability to perform multiple duties simultaneously with deadlines.
- Superior ability to lead, motivate and manage senior management team to meet organizational objectives and work within the organizations' core values.
- Superior ability to develop and maintain excellent working relationships with District officials, all senior staff, employees, other agencies and the public.
- Ability to work under pressure and carry out policies of District Council in a sound, effective manner.
- Ability to exercise good judgment and to give sound advice and write effective reports and recommendations for the guidance of Council.
- Ability to serve elected officials, senior staff and the public with tact and impartiality, while

preserving confidentiality and sensitivity on issues.

Required Training, Education, and Experience

- Minimum of seven to ten years in senior municipal management positions or similar government executive positions.
- University degree, preferably at graduate level, in a relevant discipline such as Business Administration, Commerce or Public Administration.
- Valid BC Class 5 Drivers License
- Bondable
- Certificate in Municipal Government Administration issued by the Board of Examiners of the Province of British Columbia or equivalent as issued by other Provinces or other Provincial Associations an asset.

OR

- An equivalent combination of education, training and experience.

5.2.2 Director of Planning and³⁹ Development Services

Nature and Scope of Work

The Director of Planning and Development Services plays a key leadership role in the District. Reporting to the CAO working closely with other Directors, this position leads the Planning, Development, Bylaw Enforcement, and Building Teams to achieve the overall vision of the organization and the community.

Key Responsibilities

Leadership

- Provides innovative leadership by encouraging an inspired and engaged team of people to deliver outstanding service
- Demonstrates effective strategic leadership skills by setting visions and goals and communicating them effectively across the organization.
- Advises and consults with other departments, agencies, community groups, property owners, associations, clubs, and the public to ensure that Development occurs in accordance with the Official Community Plan.
- Engages, inspires and motivates others by demonstrating enthusiasm and commitment.
- Possesses the ability to analyze, assess, and make appropriate recommendations both internally and externally.
- Embraces and implements change when appropriate to ensure continuous improvement and efficient delivery of Service.
- Adjusts rapidly to new situations warranting attention and resolution in order to ensure the District is leading or matching local government best practices in delivery of community development.

³⁹In the proposed new organizational structure the role of the Director of Development Services has been expanded to include 'Planning'

Community Development

- Maintains courteous and positive public relations with customers including residents of the community, representatives of organizations, and other District staff by delivering quality customer service.
- Through the Development Services Team, the Director plans, organizes, and directs the examination, review, and approval of land development projects from OCP level to building occupancy, and programs that establish and fulfill short and long term objectives.
- Is responsible for identifying and researching planning issues and for developing and administering comprehensive plans, programs, policies, and regulations for the physical growth and the social, cultural, and economic development of the community.
- Develops the Capital and Financial plan for Building and Planning departments.
- Negotiates contracts and agreements associated with the land development process.
- Through the Bylaw Enforcement Team, directs the development of bylaw compliance policies and guidelines to assist with the administration and enforcement to ensure best practices are applied in a consistent manner.
- Provides information, direction, and advice to other District departments, members of the public, the business community, and the media.
- Liaises with other District departments, including Corporate Services, Finance, Engineering and Operations to ensure a coordinated implementation of the organization's strategy and council priorities, and consistent application of the District's bylaws, regulations, and processes.
- Provides guidance in the development of short and long term economic development plans, as well as the gathering of information and preparation of studies, reports, and recommendations to achieve such goals. Maintain a liaison with various external agencies, including coordinating projects and promoting business within the District.
- Ensures that the Division's work, policies, procedures, practices and priorities are conducted and carried out within Council's vision for the community and in accordance with the Local Government Act, Community Charter, BC Building Code and other regulations.
- Participates in the overall planning, administration, and management of the District as a member of the District's Senior Management team.

Employee Development and Management

- Manages the Planning, Building and Bylaw Service teams comprised of exempt and union staff including leading the planning and execution of work.
- Continually shapes and develops the Planning and Development Services team to inspire commitment, high quality work and the desire to stay with the organization for the long term.
- Supports employees' growth and development through coaching conversations, employee development reviews, providing training opportunities, and mentoring.
- Unifies a team of diverse individuals behind the goal of delivering exceptional customer service.

- Provides direction to staff in the resolution of problems and complaints related to the Planning and Development Services Department and monitor results.

Required Knowledge, Skills, and Abilities

- Proven leadership in a local government environment, including experience implementing council priorities, creating effective systems to manage work flow, and leading a high performing team.
- Proven experience managing employee performance, both union and exempt.
- Ability to clearly present written and verbal information; communicates effectively in both positive and negative circumstances; listens well. Possesses superior presentation skills.
- Effective negotiation and interpersonal and management skills.
- Ability to create and implement strategic plans.
- Ability to effectively manage conflict, including leading challenging and controversial conversations.
- Thorough knowledge of the principles, practices, and methods required in the zoning and planning bylaws and comprehensive plans including their formation, process of adoption, and enforcement, including as they relate to the *Local Government Act* and other legislation.
- Extensive knowledge of community development, planning and building programs and their processes.
- Good working knowledge of relevant computer applications and GIS applications.
- Superior organizational skills and the ability to perform multiple duties simultaneously with deadlines.
- Ability to develop effective working relationships with architects, contractors, developers, owners, other employees, and the general public.
- Ability to serve as the statutory Approving Officer for the District.

Required Training, Education and Experience

- University Degree in planning, urban planning, architecture, civil engineering or closely related field, preferably at the graduate level.
- Membership or eligibility for membership with relevant professional association, e.g., the Planning Institute of British Columbia, or APEGBC.
- A minimum five to seven years as a senior manager in the Planning and Development Services field.
- Established progressive career in Planning and Development Services or related field, preferably in the municipal environment.
- Consistent professional development in both technical and people management subject areas.

AND / OR

- An equivalent combination of education, training and experience

5.2.3 Strategic Change Management Advisor

Nature and Scope of Work

The primary responsibility of the Strategic Change Management Advisor will be to create and implement change management strategies and plans in the District organization that maximize employee adoption of change processes and usage and minimize resistance.

The Strategic Change Management Advisor will play a key role in ensuring projects/change initiatives meet objectives on time and on budget by increasing employee adoption and usage. The Advisor will focus on changes to business processes, systems and technology, job roles and organization structures with an employee support and assistance orientation.

The Strategic Change Management Advisor will work to drive fast adoption, greater proficiency of the changes that impact employees in the organization to increase benefit realization and the achievement of results and outcomes.

Supervision

Reporting to the CAO, the Strategic Change Management Advisor does not have supervisory responsibility, however through a fluid management matrix the incumbent will work with the Directors to assist employees within Divisions to both train and problem solve and encourage success. The Strategic Change Management Advisor will act as a coach for Directors in assisting them to fulfill the role of change sponsor. The Strategic Change Management Advisor will also work with exempt and unionized personnel to provide direct support and coaching. The Strategic Change Management Advisor will also support project teams in integrating change management activities into their project plans. The incumbent will have no direct reports. On a regular basis, the Strategic Change Management Advisor will report to the SMT regarding progress of the change plan and 'next steps'.

Key Responsibilities

Leadership

- Develop and apply a structured methodology and lead change management activities
- Integrate change management activities into project plan
- Assess the change impact
- Complete change management assessments
- Create change management strategy
- Identify, analyze, prepare risk mitigation tactics
- Support organizational design and definition of roles and responsibilities
- Support change management at the organizational level
- Manage stakeholders

Employee Development and Management

- Identify and manage anticipated resistance
- Consult and coach project teams
- Create actionable deliverables for the five change management levers: communications plan, sponsor roadmap, coaching plan, training plan, resistance management plan.
- Support communication efforts
- Support training efforts
- Support and engage senior leaders
- Coach managers and supervisors
- Coordinate efforts with other specialists
- Evaluate and ensure user readiness
- Track and report issues
- Define and measure success metrics and monitor change progress
- Manage the portfolio and change load

Community Development

Where community contact is required as part of the Strategic Change Plan, the Strategic Change Management Advisor is responsible for identifying and researching the 'change issues' requiring community action and for developing and coordinating, in conjunction with the members of the Senior Management Team, comprehensive plans, programs, to facilitate the adoption of those aspects of the organizational change which impact the social, cultural, and economic development of the community.

Required Knowledge, Skills, and Abilities

- Experience and knowledge of change management principles, methodologies and tools.
- Familiarity with project management approaches, tools and phases of the project lifecycle.
- Exceptional communication skills – both written and verbal.
- Engages, inspires and motivates others by demonstrating enthusiasm and commitment
- Excellent active listening skills.
- Ability to clearly articulate messages to a variety of audiences.
- Ability to influence others and move toward a common vision or goal.
- Flexible and adaptable; able to work in ambiguous situations.
- Forward looking with a holistic approach.
- Problem solving and root cause identification skills.
- Able to work effectively at all levels in an organization.
- Must be a team player and able to work collaboratively with and through others.
- Acute business acumen and understanding of organizational issues and challenges.
- Experience with large-scale organizational change efforts.

Required Training, Education and Experience

Change management certification or business or public administration designation desired.

AND / OR

- An equivalent combination of education, training and experience

Recommendation

- 14 The recommended position descriptions for the Chief Administrative Officer, the Director of Planning and Development Services and the Strategic Change Management Advisor⁴⁰ are adopted and implemented.

5.3 Management Salaries

An examination of senior employee compensation was conducted and compared with those of the target municipalities. Given the confidential nature of this portion of the *Review*, this section is detailed in the *Confidential Report to Council*.

5.4 Staffing Levels and Costs

An examination of the following issues was conducted and compared with those of the target municipalities.

- number and volume of core services being delivered
- payroll costs and benefits and other pertinent financial information
- number of staff and their organizational position and roles
- alternative staffing models that could best serve the District

Given the confidential nature of this portion of the *Review*, this section is detailed in the *Confidential Report to Council*.

5.5 Professional Development Plans

Introduction

Staff should be provided opportunities for self-improvements to enhance their job skills and to permit self-development for personal enhancement. Some professional development may benefit the organization in the short term but also, over the longer term, benefit the trainee in preparing the employee for an alternative position in another organization. Motivating staff by providing opportunities for development, even for movement to another organization, is an important facet of organizational maturity.

⁴⁰ These position descriptions were required in the *Terms of Reference* for the Review. Additional position descriptions will be required for other SMT positions following Council approval of the proposed structure.

An organization with a well-developed staff training and development program is more attractive to potential employees. The important conundrum for the Senior Management Team is to maintain a constructive tension between the elements of enticing the appropriate job applicants to the District and providing an attractive program of training and personal development; and, on the other hand, retaining the staff for sufficient time to recoup the cost of training and the advantage of their added value to the District.

A requirement in the *Scope of Work* is the development of a Training and Development policy.

TRAINING and DEVELOPMENT POLICY

A Purpose

Staff are the District's most important asset. Investment in the training and development of the staff will afford the opportunity to develop the skills and competencies required to operate more effectively in support of the work of the District. It will also enhance personal satisfaction in the workplace creating an employer of choice and facilitate the retention of staff.

B Principles

- Life long-learning as a goal.
- Training and development is the responsibility of the employee and the employer.
- The training and development needs of the employee must be balanced with the operational, administrative and budgetary needs of the District.
- Training and development is available, equitably, to all eligible personnel.
- Transparency of administration of the policy.

C Objective

The objective of the policy is to build a skilled, well-trained and professional staff; to strengthen leadership and management; to ensure that all employees are fully acquainted with, and use, leading practices in their workplace and personnel are afforded access to professional contacts.

Given the appropriate investment, the intended results are:

- Personnel will be fully supported in plans to undertake self-development training programs-the District will become an employer of choice.
- Development of individual capacity, strong organizational leadership, and innovative management practices will facilitate the ability of the District to fully meet its obligations

- within the community and with its service partners and to be supportive of the corporate vision, mandate and business priorities.
- Staff will fully understand their role in support of the work of the District.
 - Personnel at all levels of the organization will possess the necessary skills, knowledge and competencies to work effectively and efficiently.
 - Executives and Managers will have the knowledge to effectively exercise their delegated authority and managerial responsibilities.
 - Personnel will be adequately trained or developed to meet the specific standards required of their trade or profession.
 - Any initiative by an employee with regard to training and development must not be in conflict with the District's process of competency-based selection or the performance appraisal process, individual annual performance plans, code of conduct, terms and conditions of employment, or any personal services contract.

D Application

This policy applies to full-time unionized, exempt employees and permanent part-time staff.

E Categories of training and development

There are two categories of training and development,

1. Required
Training and development that is required to be undertaken by an employee to address employment requirements outlined in legislation, professional standards, job descriptions, or trade certification.
2. Discretionary
Training and development that will equip the employee with skills or competencies; facilitate a more effective approach to the employee's function; or enhance the employee's opportunity for career advancement. The nature of the training and development pursued must be related to the career path of the employee as documented by the annual performance appraisal and development.

Required and discretionary training and development may include credit or non-credit courses, conferences, workshops, seminars, and e-learning webinars and leave to study for examinations related to required or discretionary training. Successful completion of all training and development is dependent upon the attainment of an acceptable pass mark or equivalent validation.

F Access to training and development

There are two avenues to access approval of training and development funding.

F.1 Departmental budget

- a. The Director of each department is responsible for developing and administering budgets for the training and development within the department.
- b. The Director is responsible for the training and development of personnel within the department to a maximum annual cost of \$500.00 per employee per fiscal year.
- c. Any application for training or development which exceeds that amount must be forwarded to the CAO for discussion with the Senior Management Team

F.2 District budget

- a. The CAO is responsible for developing and administering budgets for the training and development within the District.
- b. The CAO, with input from the Senior Management Team, is responsible for the distribution of training and development funding of personnel which exceeds the maximum funding decision of the Director of each Department.
- c. The maximum annual cost of training and development per employee which can be approved by the CAO per fiscal year is \$3,000.00
- d. With the goal of ensuring uniform and consistent application of the Policy, the discussion to approve the funding of any employee to undertake training or development is subject to discussion within the Senior Management Team and the total assigned to training and development within the District cannot exceed the budgeted amount within the District budget.

G General training within the District

To ensure that all employees are equipped with the knowledge that facilitates a workplace which is supportive of all personnel, the District provides certain 'in-service' training which is targeted at all employees and, in some cases, specific groups of employees. Such training includes:

- Orientation for new employees
- The Code of Ethics
- Respectful workplace
- Anti-bullying and harassment
- Conflict resolution
- Earthquake preparedness

- Workplace safety and first aid
- Customer service
- Mentoring and coaching
- Select aspects of the programs, strategies and approaches practiced within the District
- Labour law

Some of this training is provided to meet the District's legal obligations. Local institutions such as the Sechelt office of Capilano University and the Local Government Management Association of BC may provide some training. In addition, training can be achieved through work experience with local municipalities or First Nations administration.

H Training Expenses and Reimbursement

The types of expenses that will be reimbursed will vary by the form of training and development pursued.

- The reimbursement, generally, will include 100% of the cost of tuition, 100% of the cost of books, the cost of travel and a per diem (where the approved training or development is off the Sunshine Coast) as per corporate policy.
- The cost of any proposed training and development must include the consideration of any applicable benefits prescribed in the *Income Tax Act* or other relevant federal or provincial legislation.

I Application and approval process

Personnel wishing to apply for reimbursement or time away from work to pursue training or development should submit an application to the Director of their department. A copy will also be forwarded to Human Resources. The application will include,

- Details of the training and development
- The organization or institution which is providing the training and development.
- The benefit, or return on investment, to the employee and to the District
- Any perceived negative impact upon the employee and the District.
- Any risk to the employee and the District
- A full assessment of time required away from work
- A detailed budget including tuition fees, materials, and travel costs
- Detail of any previous training and development for the employee which has been sponsored by the District.

The Director will consider the type of training or development, the funding request, other matters such as the impact of any time away from work (having consideration of the employment record and performance appraisals of the employee), the relevance of and benefit accrued to the District; and the available department budget and impact upon the department of any time away from work.

- *If the total cost of the application is equal to or below the signing authority of the director,* the director will inform other members of the Senior Management Team of the background and tentative conclusion regarding the application. This is for the purpose of establishing and maintaining consistency in the approval or non-approval of applications for training and development.
- Having consideration of the input from the Team, the director will approve or not approve the application. Approval or non-approval is at the discretion of the director.

or

- *If the total cost of the application is above the signing authority of the director,* the director will consider the type of training or development, the amount of the funding request, other matters such as consideration of the employment record and performance appraisals of the employee, the relevance of, and benefit accrued or return on investment, to the District and the impact upon the department of any time away from work.
- The director will make a recommendation to approve or not approve the application. For the purpose of establishing and maintaining consistency in the approvals or non-approvals of applications for training and development, the application will be discussed by the Senior Management Team. The final decision regarding approval or non-approval will be made by the CAO.

An important consideration in the approval of an application for training and development will be the return on investment for both the District and the employee.

A contract will be signed between the District and the employee which addresses the terms and conditions of the self-improvement initiative.

J Completion of the training and development

Upon successful completion of the training or development, the employee will forward to the director, with a copy to Human Resources section:

- a copy of the transcript, or other proof of course completion.
- invoices requiring reimbursement

If the original application was approved by the director, the director will review and, if appropriate, approve payment of the expenses.

The details of the training or development will be entered on the employees file.

If the original application was approved by the CAO, then the CAO will consider payment of the expenses as submitted.

K Resignation of an employee for whom training and development expenses have been reimbursed

If the employee chooses to leave the employ of the District after completion of training and development for which expenses have been reimbursed, then the amount of repayment of those costs to the District will be repaid based upon the following,

- If the employee leaves within one year of completion, 100% of costs reimbursed will be repaid to the District.
- If the employee leaves within two years of completion, 75% of costs reimbursed will be repaid to the District.
- If the employee leaves within three years of completion, 50% of costs reimbursed will be repaid to the District.
- If the employee leaves after more than three years of completion, no costs need to be repaid.

L Failure to complete the training and development

If the employee fails to fully complete the training or development within the specified time, then the employee must inform the director. The employee may commit to complete the training and development within an agreed time, and with no additional cost to the District.

If the employee chooses not to undertake to complete the training or development, as above, then no expense will be claimed by or paid to the employee. Any expenses that have been reimbursed will be repaid by the employee by a process agreed with the Director or the CAO, as the original signing authority.

If the employee gives notice of resignation from employment prior to completion of the training or development, then any expenses that had been reimbursed will be repaid to the District. In accordance with the contract, see 'I' above, this payback may include deductions from outstanding salary which may be owed to the employee at the termination of employment.

M Monitoring of training and development

The Human Resources function, in concert with SMT, will be responsible for monitoring the individual and aggregated outcomes of training and development initiatives. To facilitate this, the Human Resources Section will receive copies of all applications for training and development; copies of status reports from employees; records of outcomes of training and development, and listings of employees who have received in-service training. In addition, the Human Resources Section will research and document opportunities and requirements for training and development for employees.

The Human Resources Section, in concert with SMT, will plan and coordinate the provision of in-service training.

With the goal of ensuring an effective and efficient process of training and development and support of the corporate vision, mandate, and business priorities of the District, Human Resources will report annually to the CAO on aggregated outcomes and costs of training and development undertaken by employees with recommendations for amendments to the policy and practices.

Mentoring

Employees may apply for mentoring. An experienced employee or a contracted mentor may be engaged to provide periodic on-site or off-site advice and counsel.

Mentoring is available to all employees and may apply to technical or administrative skills. However, mentoring is particularly appropriate for management personnel in preparing them for senior positions within the District.

Applications, costs and expenses are subject to the provisions of H, above. With mentoring by District employees, discussion and evaluation will be addressed by the Senior Management Team.

Recommendation

15 The Training and Development policy should be adopted and implemented.

5.6 Developing a Human Resources Strategic Plan

Council has recently adopted a new *Corporate Strategic Plan (CSP)* setting-out priorities for the organization over the next four years and beyond. Developing a Human Resources Strategic Plan (HRSP) will be taking the next logical step – ensuring that the development of a workforce is consistent with Council's vision, and that its competencies and skills are suited to address the requirements of the CSP.

Local government is faced with constant change and demands with increasing costs of services; downloading of services by the Province and demanding stakeholders; population growth; and increased diversity; along with developing technologies and other factors demand a flexible, adaptable, quality workforce. To achieve this it will be necessary to invest in the workforce, to build on the current competencies and skills of staff and, also, identify the additional competencies required to address the new challenges. That is the purpose of a Human Resources Strategic Plan.

Many issues drive the need for a comprehensive HRSP for the District of Sechelt, including:

- A new workforce with limited local government experience (60% turnover in past three years)
- An ageing and, consequently, retiring workforce and loss of corporate knowledge
- Implementation of new technologies
- Reduction of qualified and experienced local government workforce to draw on for hiring
- Demand from citizens for more effective service delivery
- Demand for more flexible workforce possessing a different mix of skills and knowledge
- Organizational change

The HRSP should create a long-term vision for the municipal workforce, and identify strategic human resource priorities.

The District has some human resources policies such as Fair Hiring; Employee Orientation, Exit Interview, Succession Planning, Workplace Wellness, Management and Confidential Employee Compensation, and Training and Development⁴¹. Interviews and document review indicated that these are outdated or, recently, have not been followed.

In the course of the *Review*, a number of deficiencies were observed in organizational effectiveness including:

- a lack of important human resources policies
- inconsistently applied performance management
- a lack of corporate focus

⁴¹ 'Training and Development' Policies were requested by the Consultants who were informed that the policy is under development

- inadequate hiring practices
- an absence of formal employee recognition
- an inadequate compensation plan
- inconsistent application of employee policies and procedures
- a lack of effective employee assessment and development

The HRSP would provide the organization with a framework to systematically address these fundamental principles of an effective organization.

5.6.1 Organizational Framework

The HRSP should include a clear vision, mission, values, principles and organization goals which are the cornerstone for the development of key success factors for the management of human resources. These key components of the plan should be consistent and complement the vision and values identified in the CSP. Although an HRSP can be developed relatively quickly, its implementation and acceptance and, subsequently, its impact both shapes and is dependent upon the adoption of the cultural changes which are required within the District of Sechelt. The plan should seek to establish vision and direction to support human resource effectiveness and contribute to overall organizational effectiveness.

5.6.2 Planning Process

Based upon the *Corporate Strategic Plan*, the HRSP anticipates the human resource needs of the organization after analyzing the organizations current HR, the external labour market and the future HR operating milieu of the organization. The analysis of HR management issues external to the organization and developing scenarios about the future are what distinguishes the HRSP from the strategic plan. The fundamental questions of the District are:

- Where are we going?
- How will we develop human resource strategies to successfully get there, given the challenges?
- What skill sets do we need to achieve our objectives?
- How can we incrementally work towards reaching these objectives?

During the course of the *Review* the consultants identified some key strategic elements as a foundation for the development of the HRSP for the District.

1. Training and Development

Ongoing training and development for staff is critical support to ensure a dynamic, knowledgeable and skilled workforce. To help the organization with the current loss of knowledge and leadership, focus should be placed on developing leadership skills, knowledge, and abilities within the organization. Managers throughout the organization must be skilled and capable of setting clear direction; determining priorities; ensuring that staff and resources are aligned to achieve organizational goals; and, providing quality information to Council to support its decision-making.

2. Performance Appraisal

Performance Management facilitates alignment between organizational goals and objectives and employees day-to-day work plans, accountabilities, and career objectives. Performance evaluation underscores what is expected of staff along with ensuring that they are provided adequate support. Ideally, performance appraisal is a two-way process which permits the employee to provide feedback on his or her role. The performance appraisal process also provides the rationale for salary increases

3. Strategic Planning

Proactive management and planning of human resources will allow the organization and its employees to be better prepared to meet the District's future requirements in ensuring effective delivery of services to the community. The human resource planning initiative should develop and implement a framework, to facilitate the identification of areas of change, risk and opportunity and to prepare succession plans to meet future needs. With the reduction of qualified trained municipal employees, more emphasis will be placed upon developing the workforce using a variety of methods including corporate/internal training, self-directed learning, e-learning and mentoring as some selective tools to meet these needs.

4. Compensation and Classification

The development of a compensation plan for exempt staff, along with a new salary grid system that is consistent with industry standards, ensures internal consistency within the organization. The redesign of some classifications to support and promote broader employee skill sets will permit increased flexibility in work assignments and permit enhanced employee satisfaction. Recognizing the fluctuating workflows in some functional areas, the goal would be to contribute to efficiencies and cost savings, to enhance the deployment of human resources in response to service requirements through broadening of job classifications.

5. Employee Recognition Program

Employees should be recognized for activities and behaviours which exemplify District values, customer service, team work, mutual respect and commitment, continuous improvement, trust and integrity, safe work practices, innovation, initiative, quality results, or any activities which significantly contribute to the *Corporate Strategic Plan*. Recognizing the achievements and contributions of employees provides numerous benefits to an organization.

- Contributing to a safe, positive, supportive and respectful workplace culture
- Communicating goals, standards and values
- Demonstrating that initiative, creativity, success, and excellence are valued; encouraging role models and the opportunity to affirm a sense of organizational community and shared purpose
- Enhancing performance levels throughout the organization
- Communicating to the tax payers that they are well-served by competent personnel and
- Increasing employee engagement and retention.

There are three opportunities for recognition of employees' actions,

- **Daily recognition** - All employees are encouraged to recognize the contributions of their co-workers through positive daily interactions. Managers, in particular, have a significant role to play in daily recognition. Each manager is expected to ensure that employees are recognized for positive contributions to the workplace on a regular basis.
- **Informal recognition**- Managers are encouraged to customize specific recognition programs which link to the strategic objectives of the division.
- **Formal recognition**- Significant achievements and milestones warrant a more substantive recognition. Such awards should be developed and implemented and be adopted as a more organization-wide or public acknowledgment of a contribution.

HR Policy Development

There is an absence of comprehensive human resource policies and procedures to provide consistent guidance and which are readily available to, and known by, all staff. Utilizing staff work teams in identifying areas needing clarity is an effective method used by many leading organizations. Staff can also provide invaluable feedback on select issues that may be perceived differently by various segments of staff.

Employee Handbook

An employee handbook is a book given to employees by the employer containing important information about company policies and procedures. Such a guide can convey organizational, employment and job-related information including matters such as vacation provisions, summarized corporate strategies, opportunities for training and development, benefits for

employees such as health club membership, rules and disciplinary and grievance procedures, and conflict of interest guidelines. In the course of the *Review*, it was noted that many employees were not informed regarding such matters. The guide provides a useful source of information to new staff as part of the orientation process. An employee handbook provides summarized information to employees, creates a common culture and facilitates a sense of openness and consistency. An Employee Handbook is particularly beneficial in an organization with high turnover or a large intake of new employees.

5.7 An Integrated Human Resource Approach

Introduction

An integral facet of effective and efficient municipal government is a valid and consistent employee-focused human resources strategy. Salaries and benefits for municipal employees typically comprise between 70 and 90% of municipal costs, therefore it is important that personnel are not only provided appropriate supervisory and management backing but are also encouraged to strive for continual improvement.

Municipal government must be attuned to, aligned with, and able to address local service needs. Personnel selection, particularly of management, should be based on a rational and defensible process of intake and promotion. Employees, at all levels, then possess the ability and ongoing organizational support to assess, plan and implement an effective and efficient community based service. In the District Citizen Survey, only 43% of respondents were satisfied with the services provided by the District.⁴²

A multi-organizational review conducted in Great Britain⁴³, identified performance and workforce morale as key issues in organizational effectiveness. The review proposed a holistic focus on:

- The roles and structures in which employees work;
- The level of support they are given in training and development;
- How they are rewarded; and
- How they are motivated to perform to their full potential.

A focus on employee selection, support and retention creates a desirable workplace and reduces the cost of employee turnover. These direct costs, comprised of advertising, moving, retraining, along with the cost of inefficacy during the learning curve of a new employee, and all the associated costs of HR personnel is significant. A 60% turnover in District personnel over three

⁴² District of Sechelt, Citizen Survey, 2014

⁴³ Gash, Tom. *The New Bill: Modernizing the police workforce* (Institute for Public Policy Research, Feb 2008)

years impacts morale and the performance of other staff. Also, service effectiveness to the public and working relationships with other stakeholders are impacted by turnover.

How employees experience the corporate culture in which they work greatly influences individual and organizational performance. So called, 'best companies' provide a nearly three times greater stock-market return than non-performing companies.⁴⁴ These same 'best companies' have approximately half of the personnel turnover of other companies in the same industry. In the District Citizens Survey, in response to the statement, '*the management of government of Sechelt works together as a dynamic team to provide positive and constructive leadership for our community*'; only 4% of respondents were 'very satisfied' and only 22% 'somewhat satisfied'. 'Best companies' are assessed based upon employee's perspective of their company's credibility, focus or vision, respect, fairness, pride and camaraderie. In the interviews conducted in the course of the *Review*, these were not commonly expressed perceptions of the District.

5.8 Competency-based Performance

Competency-based performance is an integral part of an organization's human resources approach. Ideally, the components of a human resources strategy in the District should be integrated.

In the course of the *Review*, the consultants were informed by interviewees of concerns regarding the rationale for appointments to management levels; the perceived abilities of some appointees, and apprehension regarding the validity of the process which was used. Some managers were appointed from the private sector with limited understanding of workings of municipal government or the relevant legislation. The failure to appoint managers with the appropriate competencies directly impacts the ability of the District to meet its mandate in an effective and efficient manner. Likewise, even the perception amongst staff or the public that appointments were made not based upon a rational evidence-based and consistent approach undermines both the legitimacy of human resources approaches and the assessment and support of those who were appointed. In addition, it was suggested that some job descriptions are not current and not every employee has been subject to a recent performance appraisal. There is no current and effective policy for management training and development. Review by the Consultants of documents provided in the course of the *Review* confirmed these perceptions.

Each aspect of HR should be sourced in a similar competency-based approach, should dovetail with other facets of personnel management, and be tailored to the competencies required for

⁴⁴Great Place to Work Institute, 2015

effective functioning at a particular level in the organization. This approach is particularly relevant at senior management level where the possession of competencies rather than skills is important.

Competency-based performance should complement the following:

- Position descriptions of all levels in the organization
- Selection at all levels of the organization
- Training of all personnel
- Performance appraisal of personnel

5.8.1 Competency based selection and behavioural-descriptive interviewing for management positions

A 'competency' is any skill, behaviour, knowledge or characteristic that is essential to the effective performance of a task. Certain competencies have been identified as essential to effective management and the competencies should be determined by the particular needs of the organization.

Behavioural-descriptive interviewing is a method or approach to interviews which is designed to draw out those behaviours which demonstrate the possession of specific competencies.

Behavioural Descriptive Interviewing is a process of getting candidates to cite examples of their work experiences that describe their actions and measuring those statements against a pre-defined behavioural job profile. It provides a focus on actual demonstrated behaviours.

Below are noted the range of competencies which are appropriate for a management level position within municipal government. The selection of, perhaps, 5-7 competencies, will be determined by the specific needs of the District and will be commensurate with the goals of Council and the CAO. The 13 possible competencies are clustered under five categories of competencies. The five competency groups are:

- Change leadership
- Results focus
- Decision-making ability, judgement
- People skills
- Commitment to service

Table 4 Management Competencies for the District of Sechelt⁴⁵

Competency	Definition
1. Change management	Change management in municipal government requires the recognition of a need for change. Change management employs an environmental analysis, the development, articulation and implementation of an action plan and the timely orchestration of the requisite human and physical resources to bring about a desired result.
2. Leadership	Ability to assume and maintain the role of leader of the Department by demonstrating exemplary values and principles and by identifying possible and competing courses of action, inspiring group members and motivating others to act.
3. Team building	Develops cooperation and information sharing between employees and amongst others such that mutual support focuses on common goals and ensures enhanced organizational effectiveness.
4. Time work management	Monitors and assesses incoming work demands; prioritizes relative importance of tasks; assumes direct responsibility or delegates where appropriate; responds to demands in timely manner with suitable involvement, oversight and intervention.
5. Planning and priorities	Appropriately gathers and interprets information; supplements where required; assesses relative resource needs; establishes short and long-term Department within District goals; implements processes which ensure the relevant resource requests; ensures approaches are introduced to address Department demands and facilitates ongoing monitoring and program and resource adjustments, if required.
6. Coaching and development	Facilitates continuous learning by fostering, guiding and developing in others the skills and knowledge which support and balances the short and long-term goals of the individual and the organization.
7. Accountability	Understands, accepts and practices accountability to Council and liaises and reports appropriately with Council and the community in the development, implementation and outcomes of policies, practices and programs.
8. Innovation and envisioning	Scans internal and external organizational environments; identifies key issues to be addressed and determines and prioritizes necessary actions given the current or future needs of the organization. Develops concepts for an organization of continuous improvement.
9. Analytical thinking.	Analyses situations or concepts by breaking down into constituent parts; systematically identifies information needs and analysis required and desirable outcomes to address issues or resolve problems.
10. Organizational and community awareness	Understands, fosters and manages positive and productive relationships within the Department, the District and with Council, with other stakeholders and the community; identifies key decision makers; and fosters support for the organization which buttresses long-term organizational goals.
11. Diversity	Understands and respects the norms, values and behaviours of other cultures, religions and socio-economic groups within the Department, the District and the community; works effectively to encourage active participation in approaches and programs which support organizational goals; incorporates such values into the core values of the Department and District.
12. Effective Communication and Listening	Analyses questions, seeks clarification where required and organizes thoughts such that issues are addressed in a succinct and clear manner. Appropriately interprets questions and comments; assesses information needs and organizes responses such that the listener is fully, to the extent necessary, informed regarding the issue.
13. Commitment to Service	Understands the concept and practice of 'customer service' and how timely service to the community impacts public and employee perceptions of the effectiveness of the District in addressing demands. Works with stakeholders, community partners and employees to determine service requirements, coordinates available resources, (or develops business case for new resources) to respond to routine and emergency service requirements.

⁴⁵Other competencies should be developed for all levels within the District

Findings

The District has some human resources policies and processes in place. However, the District-wide orchestration of competency based selection and performance appraisal policies and process will enhance the likelihood that personnel, particularly management, are appointed possessing the necessary competencies to function and to effectively manage and motivate staff in support of the corporate mandate.

5.9 Personnel Development and Wellness

A common theme in interviews in the course of the *Review* was the issues of ‘personnel development’. Many interviewees mentioned limited support and others mentioned an absence of a coordinated approach to training and management development.

The Myers-Briggs (MBTI) is an example of a personnel assessment that can be used as a tool for change, personal growth and development in areas such as communication, leadership, innovation, change and conflict. It provides practical and leadership information in support of personal, career, or business decision-making. Individuals can gain insight for directing and transforming their careers by developing an enhanced understanding of:

- preference style and top career interests
- individual, leadership, and team strengths and skills
- responses to stress, conflict and change
- interpersonal and group communications
- problem solving, motivation, and learning styles

MBTI is used in the University of BC, Northern Alberta Institute of Technology, BC Ministry of Finance, IBM, University of Saskatchewan and Alberta Treasury and the Government of Canada and the Canadian Police College⁴⁶. MBTI supports counseling services for employees and can be used as a foundation for determining individual work oriented training needs.

Management must balance their duties of providing for employees’ development and wellness and helping them meet the goals and expectations of the agency. When managers enhance the vitality of their staff, they improve the organization as a whole. A plan that augments the long-term wellness of personnel allows for increased job satisfaction, productivity, and overall health of the organization. An employee wellness program (EWP) provides employees the tools they need to address their physical, mental, emotional, and spiritual health and well-being. A review of

⁴⁶<http://www.psychometrics.com/docs/canadian-police-collegecs.pdf>

'days lost' in the District showed a large number of employees had taken time off for stress related reasons.

An EWP should encompass employees' entire careers: recruitment, retention, and retirement. The plan must adhere to the current culture of the organization and address the local needs and resources available. Through course work, support networks, and practical recommendations from fellow employees, staff can learn wellness techniques to apply to their daily lives. This combination of theoretical and tactical information will help employees improve their personal well-being and maximize their productivity.⁴⁷

The program should address the needs of employees rather than solely the managements' perception of needs. Issues or topics to be addressed may be unique to an organization. Methods to ensure more tailored approaches include employee surveys, focus groups, and posing the relevant questions during the periodic employee performance interviews. Experience in the federal government^{48, 49} demonstrates that the response to identified needs may be as simple as a lunch time information session on diet, stress or background on participation in a cause such as 'Ride for Cancer'. Information can be provided by an employee assistance program representative or through peer learning with information provided by a work specialist.⁵⁰

Employee wellness and support is important in maintaining employees' physical and psychological health. These result in more motivated employees, lower sick time, and improved performance. This, in turn, translates into more effective and efficient District service to the community.

Findings

Developing a HRSP is an evolutionary process with the overall purpose of ensuring adequate human resources are developed to meet the strategic goals and operational plans of the organization. The task of the HR function is to focus on delivering unique talent solutions tailored to the Districts requirements. Although some human resource policies exist within the District, the policies require revision as outlined and, equally important, adherence to the policies should be emphasized. Evidence suggested that there was limited use of consistent and rational recruitment and appointment processes. The Plan should define the human resource needs,

⁴⁷ National Quality Institute Healthy Workplace Criteria

⁴⁸ Interview in the course of the *Review*.

⁴⁹ Canadian Centre for Occupational Health and Safety, 2014

⁵⁰ See, for example, courses available at <http://www.policecouncil.ca/>

articulate ways to achieve those and develop and establish approaches to attracting and retaining the appropriate personnel. An HRSP is not a static document. The goal should be to review and continuously improve all elements of the organizations human resource management to ensure their ongoing alignment with the Council's overall strategic direction.

Recommendations

- 16 That appointments to exempt and unionized positions within the District should be competency based.
- 17 That in conjunction with the Training and Development Policy, as outlined elsewhere in this report, the current policies such as Workplace Wellness, Employee Orientation should be integrated into a comprehensive Human Resources Plan.
- 18 Exit Interviews should be reviewed and revised to ensure District approaches are supportive of employee welfare and workplace wellness,
- 19 A process, such as described above, should be implemented to develop a Human Resources Strategic Plan.

6 Additional initiatives in support of the Corporate Strategic Plan

6.1 Strategic Communication Plan

Introduction

In the course of the Review, the concept of ‘silo’ was mentioned frequently with many staff perceiving an absence of communication between departments. Others mentioned a lack of communication within departments and some rarely spoke with the managers. The overall observation was that there was little information sharing between departments with the result that staff in one department had limited knowledge of the work occurring in others. It was suggested that the absence of such information sharing increased moving up the hierarchy, the Senior Management Committee⁵¹ was not seen to share ideas or reach consensus on District matters. Likewise, Directors were not considered to be the source of information as limited information was passed to other personnel within the department. The bi-monthly staff meetings⁵² intended for all personnel was mentioned as a welcome approach to information sharing. These luncheon meetings allow each department to share information and describe new initiatives taking place.

In the District’s Corporate Strategic Plan, Council has expressed a desire to increase communication with the community.⁵³

A communications strategy must also facilitate the everyday internal flow of management-oriented information within the organization. Part of the strategic communications strategy will be a communications approach to the change process which is addressed elsewhere in this report. Keeping personnel informed of the vision, goals, the intermediate stages and progress is an important element in the success of the plan.

Findings

Four principal issues underscore the need for the development and adoption of a communications strategy:

- the election of a new Council
- the professed desire of Council to undertake greater communication with the community
- the conduct of the District review and the associated need to communicate outcomes and change processes to employees

⁵¹ Redefined role and renamed as Senior Management Team

⁵² See page 8

⁵³ Goal 3, “To have an active and engaged community”

- the need for enhanced communication between staff

The communications strategy should be directed by council to public and external stakeholders and the internal communications with employees directed by the CAO and the Senior Management Team.

Recommendations

- 20 The District should develop a strategic communications plan ensuring regular and frequent provision of information to the public and to external stakeholders and which provide status reports on Council's goals and objectives and ensures input from relevant parties.
- 21 The District should develop and implement a structure and process to facilitate vertical and lateral internal communication which ensures trickle down of Council goals interpreted appropriately for each level/function within the District of Sechelt, along with the provision of current periodic status reports including feedback from recipients of communications.

6.2 Project Management

Given the defined time frame, focused objectives and other parameters, a project should be managed independent of other operational protocols or procedures. The Strategic Change Plan, as discussed, is comprised of several projects, which once the project plan is detailed, will describe singular goals and timing and all the elements of project management. These projects, contributing to the umbrella change plan will include 'projects' such as the development of competency based selection; the transition from the existing organization structure to the new proposed structure; and the development and introduction of a strategic communications approach. The development of these policies or procedures may be a project which, later, transitions to operational once they are completed and implemented within the District.

The District currently has several such projects. An example is the development of the Waste Water Treatment Facility (WWTF), a \$25m project which was managed by an outside contractor. Final trials of the facility are being conducted. If successful, the WWTF would cease to be a project and transition to an operational responsibility. The new proposed organizational structure outlines the suggested operational responsibility for the facility.

The introduction of changes in IT is a defined project and subject to an IT implementation plan.⁵⁴ The IT plan is being primarily coordinated by a staff person in the District. The plan is multifaceted and includes,

- OnBase
- CityWorks
- Dayforce
- Ceridian
- Vadim (financial)
- Vanage
- GIS (Geographic Information Systems)
- Maintenance Management Program
- Equipment Maintenance Tracking
- Asset Management
- E-meetings
- Council Chambers Technology upgrade
- Citizen Self-service portal
- Automatic Vehicle Tracking

Both the WWTF and the IT project were mentioned in interviews. The WWF was mentioned for being considerably over cost, subject to criticism in determining the location of the facility, and its coordination considered 'remote' from the senior management.

The tasks involved in the IT change plan, although defined in the IT implementation plans⁵⁵, were subject to a lack of support in their implementation. Interviews indicated that personnel in departments were not able to find the time to devote to the introduction of a range of software initiatives. Neither did they have the inclination to become involved in a task which was considered specialized and peripheral to their position description. Moreover, without a 'champion' within management there was limited incentive for staff to endorse and adopt the proposed changes in IT.

Findings

Several valuable projects initiated within the District which would accrue benefits to the District and its staff have faltered or were subject to delay or to resistance amongst staff because of competing time pressures, lack of project information or the perceived absence of a champion

⁵⁴ See also, Enterprise Resource Planning (ERP), District of Sechelt

⁵⁵ See IT Integrated Project Gantt Charts, January 2015; Infrastructure Upgrades Gantt chart, January 2015; Infrastructure Upgrades 2014 – Accomplishments.

who was capable and willing to promote the project within the District or the department. Few, projects were supported by a business case. In addition, there was a lack of overall orchestration to assess their relevance to the Corporate Strategic Plan, or to establish priorities for staff. Interviews suggested that none were subject to 'sun-set' clauses.⁵⁶

The following summarizes the suggested phases of the management of a project in the Sechelt context⁵⁷.

1. Define the parameters of the project and describe its constituent parts encapsulated in a Scope Statement.
2. Describe the goal. Establish the intended outcome. Prepare a business case which details the business problem and the solutions provided by the project completion along with the risks.
3. If the project falls within the criteria to be established, then present the project to Senior Management Team for prioritization and approval.
4. Identify project risks and mitigation strategies.
5. Delineate each of the tasks required to achieve the desired outcome of the project.
6. Identify a person responsible, internal or external to the District, for each of the sub-tasks which comprise the whole project. Identify the project sponsor. Depending upon the magnitude/impact of the project, this may be a person such as a Director or a group such as a Senior Management Team.
7. Establish the time lines, costs and resource requirements for each task as a coordinated part of the complete project timing.
8. Periodically monitor activities of those responsible for tasks and review project progress against time and cost base lines.
9. Provide periodic updates to Senior Management Team and staff who may be undertaking the work or who will be impacted by the project outcomes.
10. Bring closure to the project, review anticipated time and cost baselines against outcome. Evaluate the impact of the implementation of the project. Adjust scope, administration or operations as required and use lessons learned for the next project.

In the course of interviews conducted as part of the *Review*, three principal issues were noted as negatively impacting the success of projects in the District.

- delay or resistance amongst staff because of competing time pressures
- lack of project information including defining benefits and expectations

⁵⁶Used primarily in law, a provision that it will automatically be terminated after a fixed period unless it is extended by law. The concept also applies to project management to prevent the project continuing *ad infinitum* without review or evaluation.

⁵⁷ A more detailed explanation of the proposed organizational changes is provided in the Report to Council

- the perceived absence of a champion who is capable and willing to promote the project within District or the department.

Recommendations

- 22 The District should refine the Strategic Information Technology Plan for measured introduction and guidance of IT initiatives with ‘champions’ identified at a senior level and within departments and orchestrated across the District.
- 23 The District should initiate the administration of projects in which,
- New projects, supported by a business case, are subject to review by the Senior Management Team.
 - Documentation which ensures that projects are dovetailed with Council's goals and objectives and project progress is periodically monitored at senior management level to ensure ongoing relevance and currency.
 - Project/administrative files are maintained as current along with details of contacts/meetings with public, contractors, developers and stakeholders.
 - A project sponsor or ‘champion’ is appointed from Senior Management Team who will provide guidance to the Project Manager and oversee the progress of District projects.
- 24 The District should ensure selection of major projects⁵⁸ is subject to evaluation through the development of a business case and presentation to Senior Management Team.
- 25 The District should ensure that at the outset of any major project, a multifunction group meeting is arranged to ensure all necessary personnel are informed of the project and to establish a preliminary assignment of responsibility and accountability to the Department(s) and personnel with the appropriate skills, experience and staff availability.
- 26 The District should ensure that each major project is subject to periodic review and assessment and includes a ‘sun-set’ clause.
- 27 The District should share project information and expectations with the entire organization using formal internal communication processes.

⁵⁸Criteria to be determined based upon value, complexity, staff time likely to be consumed and value to the community

7 All Recommendations⁵⁹

Principal strategic recommendation

A strategic change management plan is developed and implemented which addresses the governance, organizational, management, administrative and operational changes identified in the Report of the Review and approved by Council.

And,

- 1 Council review its committee structure and terms of reference to determine if some committees can be eliminated and other consolidated to reduce the work load of both Council and staff.
- 2 Council and staff conduct an annual joint workshop on governance and organization effectiveness to determine how effective they are working together and what areas may need to be improved upon.
- 3 Council develops an annual self-audit system to evaluate if it is functioning effectively using good governance principles and, if not, develop appropriate corrective action to improve effectiveness.
- 4 Council provides an annual budget for Council specifically directed to training and development.
- 5 Council meets a minimum of twice annually to review the strategic plan with the CAO and senior staff and discuss key issues that may be facing the municipality.
- 6 Council develops a performance management system for the CAO and meets annually to review his or her performance and development.
- 7 Council and senior staff develop a joint *Code of Ethics and Conduct* to help guide their conduct recognizing their allegiance and loyalties are to the community as a whole and not to individuals or groups.

⁵⁹ For 'Recommendations' in their narrative context, see detail in the above report.

- 8 Council and senior staff reviews the procedure bylaw and agenda procedures to determine what changes and improvements can be made to ensure agendas are prepared with adequate information and in a timely manner for Council to review before making decisions.
- 9 A Change Management plan should be developed and implemented which addresses the governance, organizational, management, administrative, and operational changes identified in the Report of the Review and approved by Council.
- 10 As a component of the Strategic Change Management, a communications plan should be developed which explains to staff, and the community, the anticipated process and timing of the changes
- 11 The new organizational structure should be implemented comprised of three divisions, with the attendant changes in personnel/organizational positions.
- 12 A Strategic Change Management Advisor should be appointed, for a limited term for the duration of the strategic change plan, to work in concert with the CAO and SMT.
- 13 An Implementation Committee should be introduced to work in concert with the CAO and the SMT for the duration of the Strategic Change Plan. The Committee should include representation from Council, the Strategic Change Management Advisor, Senior Management, and exempt and unionized personnel.
- 14 The recommended position descriptions for the Chief Administrative Officer, the Director of Planning and Development Services and the Strategic Change Management Advisor are adopted and implemented.
- 15 The Training and Development policy should be adopted and implemented.
- 16 That appointments to exempt and unionized positions within the District should be competency based.
- 17 That in conjunction with the Training and Development Policy, as outlined elsewhere in this report, the current policies such as Workplace Wellness, Employee Orientation should be integrated into a comprehensive Human Resources Plan.

- 18 Exit Interviews should be reviewed and revised to ensure District approaches are supportive of employee welfare and workplace wellness.
- 19 A process, such as described above, should be implemented to develop a Human Resources Strategic Plan.
- 20 The District should develop a strategic communications plan ensuring regular and frequent provision of information to the public and to external stakeholders and which provide status reports on Council's goals and objectives and ensures input from relevant parties.
- 21 The District should develop and implement a structure and process to facilitate vertical and lateral internal communication which ensures trickle down of Council goals interpreted appropriately for each level/function within the District of Sechelt, along with the provision of current periodic status reports including feedback from recipients of communications.
- 22 The District should refine the Strategic Information Technology Plan for measured introduction and guidance of IT initiatives with 'champions' identified at a senior level and within departments and orchestrated across the District.
- 23 The District should initiate the administration of projects in which,
- New projects, supported by a business case, are subject to review by the Senior Management Team.
 - Documentation which ensures that projects are dovetailed with Council's goals and objectives and project progress is periodically monitored at senior management level to ensure ongoing relevance and currency.
 - Project/administrative files are maintained as current along with details of contacts/meetings with public, contractors, developers and stakeholders.
 - A project sponsor or 'champion' is appointed from Senior Management Team who will provide guidance to the Project Manager and oversee the progress of District projects.
- 24 The District should ensure selection of major projects⁶⁰ is subject to evaluation through the development of a business case and presentation to Senior Management Team.

⁶⁰Criteria to be determined based upon value, complexity, staff time likely to be consumed and value to the community

- 25 The District should ensure that at the outset of any major project, a multifunction group meeting is arranged to ensure all necessary personnel are informed of the project and to establish a preliminary assignment of responsibility and accountability to the Department(s) and personnel with the appropriate skills, experience and staff availability.

- 26 The District should ensure that each major project is subject to periodic review and assessment and includes a 'sun-set' clause.

- 27 The District should share project information and expectations with the entire organization using internal communication processes.

APPENDICES

- 2. Comparator Survey
- 2.2 Sechelt Development Summary 2000 - 2014
- 4.1.1 Current Organizational Structure 2015
 - Senior Management Excluded Positions
- 4.1.3 Recommended Organizational Structure
 - Corporate & Financial Services
- 4.1.4 Recommended Organizational Structure
 - Planning & Development
- 4.1.5 Recommended Organizational Structure
 - Engineering & Operations

Appendix 2.2 Comparator Surveys as completed by municipalities

District of Sechelt Organizational and Management Review 2015

Introduction

The consulting firms of perivale+taylor and R.A. Beauchamp & Associates have been engaged to conduct a review of the District of Sechelt. Several municipalities, including yours, have kindly agreed to provide comparative information to assist the review. The individual responses will be kept strictly confidential and the aggregated information will be shared with participants at a later date. There are three sections to the survey:

1. Information about the comparator municipality- This relates to baseline data regarding the quantitative description of the breadth of services provided.
2. Services delivered - The survey seeks to determine the service provider: i.e. directly by the municipality, through the regional district, or contracted out.
3. Exempt Positions' comparators - The survey seeks comparator data for 14 positions currently involved in the Sechelt Review. These positions or the same title may or may not exist within your municipality.

We have attempted to make it as easy as possible to provide the requested information. Where possible, responses can be 'checked' on the matrix from your general knowledge of your municipality. On other occasions, the question may require a little research. We would appreciate your returning the survey information by April 24th. The completed survey can be emailed to a member of the review team, Mike Pellant, at mpellant@telus.net

If you have any questions or suggestions concerning the survey, please do not hesitate to contact Mike Pellant via email or 604.948.1347.

Name of Comparator Municipality

1 Information about the Comparator Municipality

General questions for Statistical Comparisons for 2014	
Population 2014	
Paved roads in kilometers	
Water lines in kilometers	
Sanitary sewers in kilometers	
2014 debt amortization	
2014 total reserve funds including utilities	
2014 budget expenditures including operation, capital, debt and contracted services	
2014 average residential property tax assessment	
2014 1% tax generation in \$	
2014 total payroll \$	
2014 total payroll overtime \$	
2014 FTE's – Full-time and Part-time	Full-time..... Part-time.....
2014 number of exempt positions	

2 Services Delivered

Please tick the appropriate answer

Service - delivered by >	Municipality	Regional District	Contracted	Other/which organization?	Not provided
Water treatment					
Waste water treatment					
Storm drainage					
Garbage collection					
Recycling program					
Road and ditch maintenance					
Sidewalks maintenance					
Street lights					
Parks					
Recreation facilities					
Community hall					
Cemetery					
Emergency planning					
Fire service					
Police service					
Arts and culture					
Library service					
Other?					
Other?					

Please use this space for any clarifying notes or questions:

3 Exempt Positions Comparator

Position 1 of 14

Chief Administrative Officer or Equivalent Position [<i>If no equivalent position, check here and go to next position..... ()</i>]	
If equivalent position, provide title	
Reports to (title)	
Number of reports to CAO	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	
Salary range (grid)2015 or specify yr.in \$s	Minimum.....maximum...
Eligibility for annual bonus award	Yes.....No.....

Position 2 of 14

Director/Manager of Legislative Services or Corporate Services or Equivalent Position [<i>If no equivalent position, check here and go to next position..... ()</i>]	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	
Salary range (grid)2015 or specify yr.in \$s	Minimum.....maximum...
eligibility for annual bonus award	Yes.....No.....

Position 3 of 14

Corporate Officer or Equivalent Position[If no equivalent position, check here and go to next position..... ()]	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility \$ including operating, capital and utilities	
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximum...
Eligibility for annual bonus award	Yes.....No.....

Position 4 of 14

Deputy Corporate Officer or Equivalent Position[If no equivalent position, check here and go to next position..... ()]	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximu m.....
Eligibility for annual bonus award	Yes.....No.....

Position 5 of 14

Executive Assistant to the Mayor and/or CAO or Equivalent Position[If no equivalent position, check here and go to next position..... ()]	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximum...
Eligibility for annual bonus award	Yes.....No.....

Position 6 of 14

Communication Officer/Coordinator or Equivalent Position[<i>If no equivalent position, check here and go to next position..... ()</i>]	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximum...
Eligibility for annual bonus award	Yes.....No.....

Position 7 of 14

Human Resources Manager or Equivalent Position[<i>If no equivalent position, check here and go to next position..... ()</i>]	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximum...
Eligibility for annual bonus award	Yes.....No.....

Position 8 of 14

Director of Financial Services (CFO) or Equivalent Position[<i>If no equivalent position, check here and go to next position..... ()</i>]	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$'s	Minimum.....maximum.....
Eligibility for annual bonus award	Yes.....No.....

Position 9 of 14

Manager of Financial Services (Deputy CFO) or Equivalent Position <i>[If no equivalent position, check here and go to next position..... ()]</i>	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximum...
Eligibility for annual bonus award	Yes.....No.....

Position 10 of 14

Director of Engineering/Operations or Equivalent Position <i>[If no equivalent position, check here and go to next position..... ()]</i>	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$'s	Minimum.....maximum...
Eligibility for annual bonus award	Yes.....No.....

Position 11 of 14

Director of Planning and Development or Equivalent Position <i>[If no equivalent position, check here and go to next position..... ()]</i>	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximum.....
Eligibility for annual bonus award	Yes.....No.....

Position 12 of 14

Deputy Director of Planning and Development or Equivalent Position <i>[If no equivalent position, check here and go to next position..... ()]</i>	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximum...
Eligibility for annual bonus award	Yes.....No.....

13 of 14

Manager of Engineering or Municipal Engineer or Equivalent Position <i>[If no equivalent position, check here and go to next position..... ()]</i>	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximum.....
Eligibility for annual bonus award	Yes.....No.....

14 of 14

Superintendent of Public Works and Parks or Equivalent Position <i>[If no equivalent position, check here and go to next position..... ()]</i>	
If equivalent position, provide title	
Reports to (title)	
Number of reports to Position	
Years of experience in local government	
Years in current position	
Budget responsibility in \$ including operating, capital and utilities	\$
Salary range (grid) 2015 or specify yr.in \$\$	Minimum.....maximum.....
Eligibility for annual bonus award	Yes.....No.....

Thank you for your assistance.

Please use this space for any clarifying notes or questions:

Appendix 2.2.1 Sechelt Development Summary 2000 - 2014

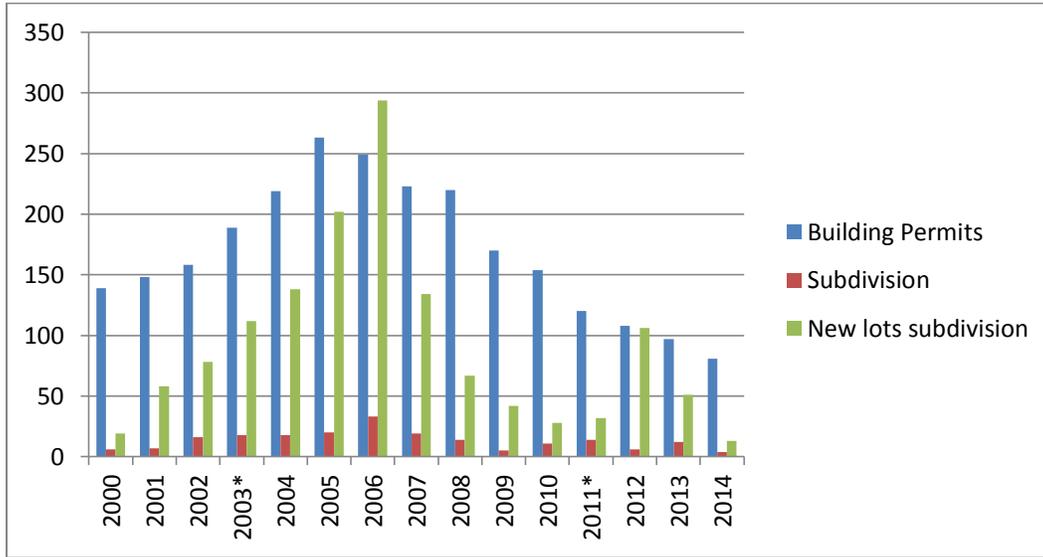
Year	Building Permits Issued	Develop't Permit Applications	Develop't Variance Permits	Rezoning Applications	Official Community Plan Amendment Applications	Board of Variance applications	Sub-division applications	No. of new lots approved for subdivision **
2000	139	3	5	5	4	1	6	19
2001	148	4	3	3	1		7	58
2002	158	2	3	7	3		16	78
2003 ⁶¹	189	4	8	7	4		18	112
2004	219	13	8	9	3		18	138
2005	263	14	8	11	3		20	203
2006	249	10	4	17	3	1	33	294
2007	223	10	1	13	10		19	134
2008	220	11	7	12	6		14	67
2009	170	4	7	4	2	1	5	42
2010	154	11	7	4	2		11	28
2011 ⁶²	120	19 (9 Minor)	2	8	1		14	32
2012	108	12 (11 Minor)	5	5	5	1	6	106
2013	97	28 (23 Minor)	3	9	3		12	51
2014	81	29 (19 Minor)	2	4	1		4	13

⁶¹ New OCP adopted 2003

⁶² New OCP adopted 2011

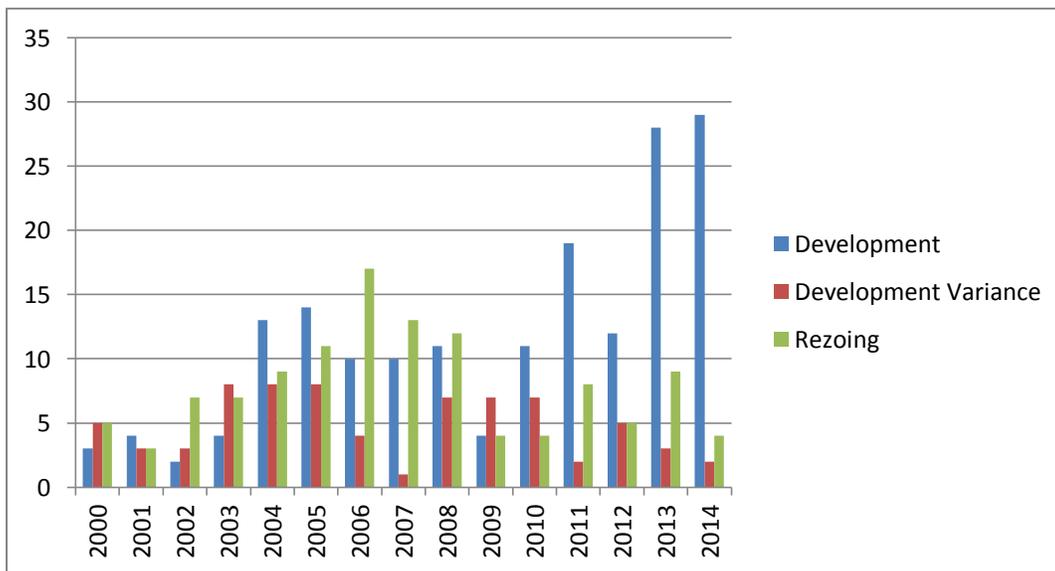
Appendix 2.2.2 Sechelt Applications 2000 - 2014

**Building Permits
Subdivision
New Lots Subdivision**

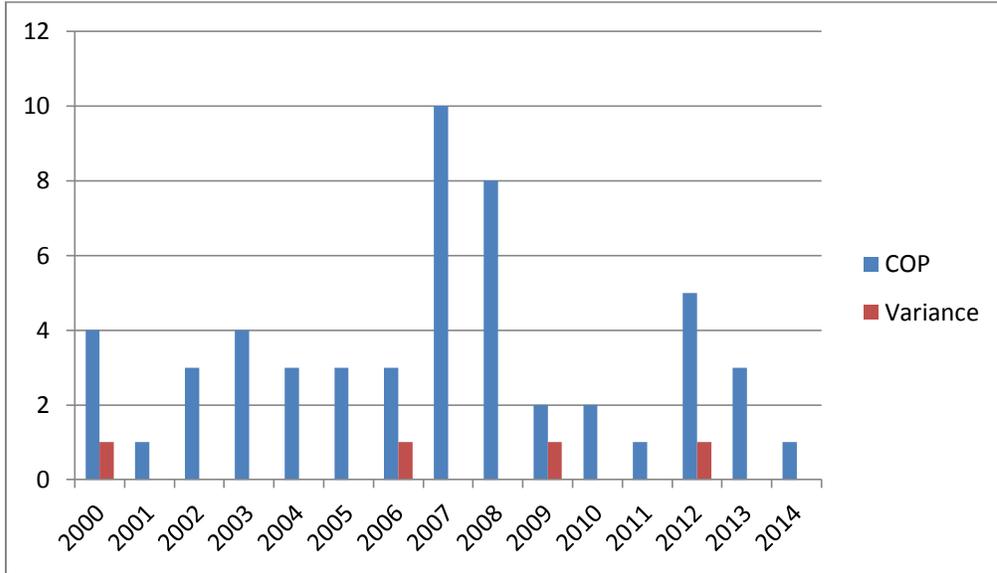


Appendix 2.2.3 Sechelt Applications 2000 - 2014

**Development Permits
Development Variance
Rezoning**

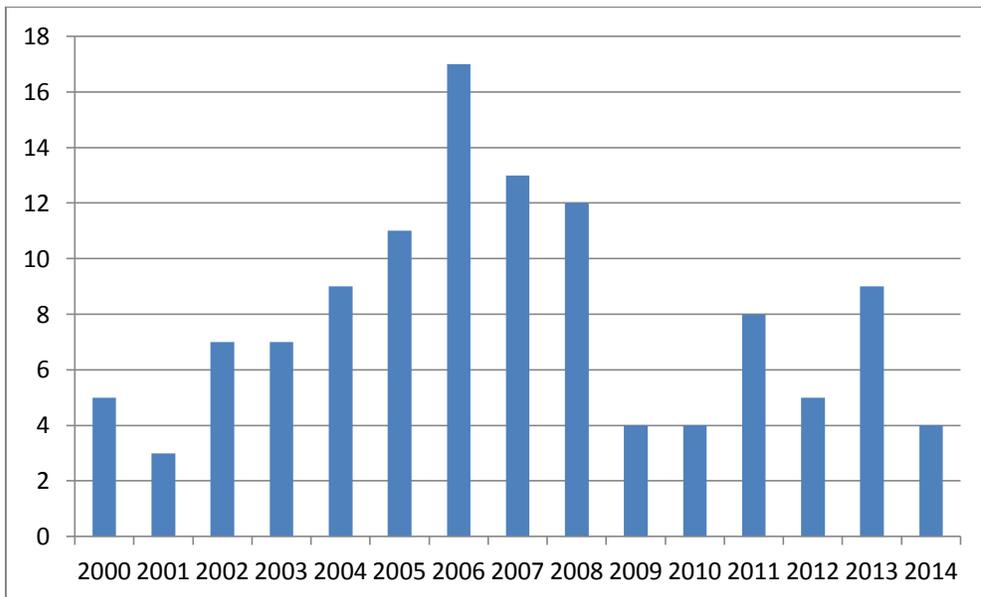


Appendix 2.2.4 COP Amendment and Board of Variance



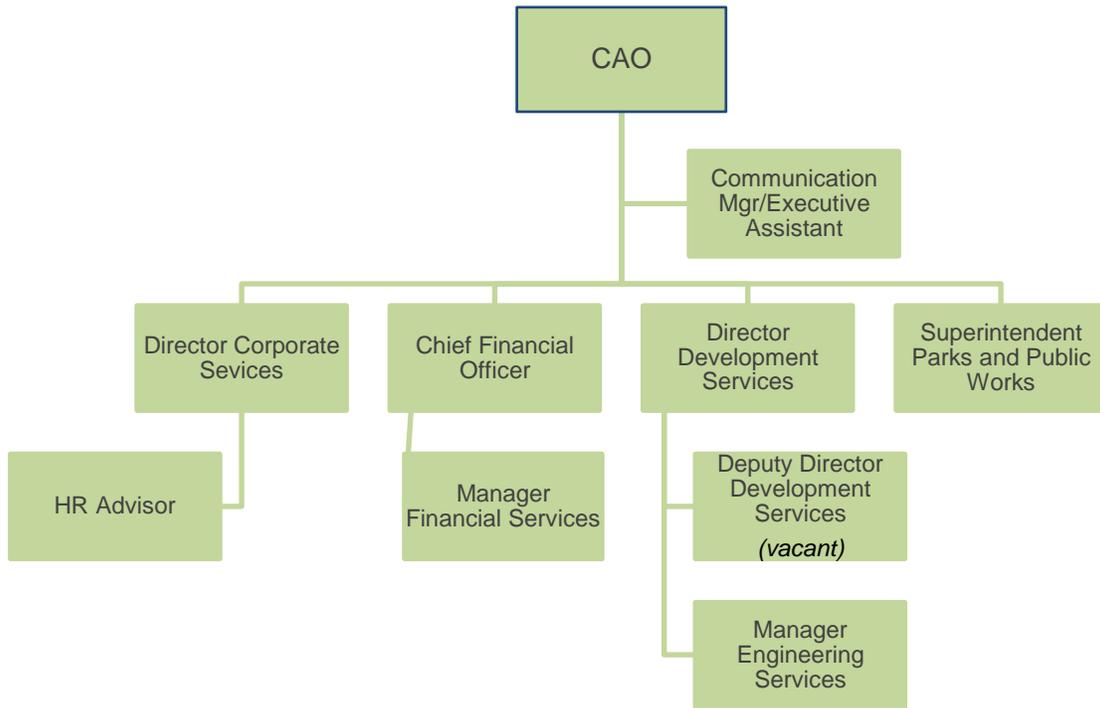
Appendix 2.2.5 Sechelt Rezoning Applications 2000 - 2014

The chart illustrates the varying workload of rezoning. The final report chart will include building permits, Development Permit Applications, Development Variance Applications, Zoning Applications and Subdivision applications.



Appendix 4.1.1

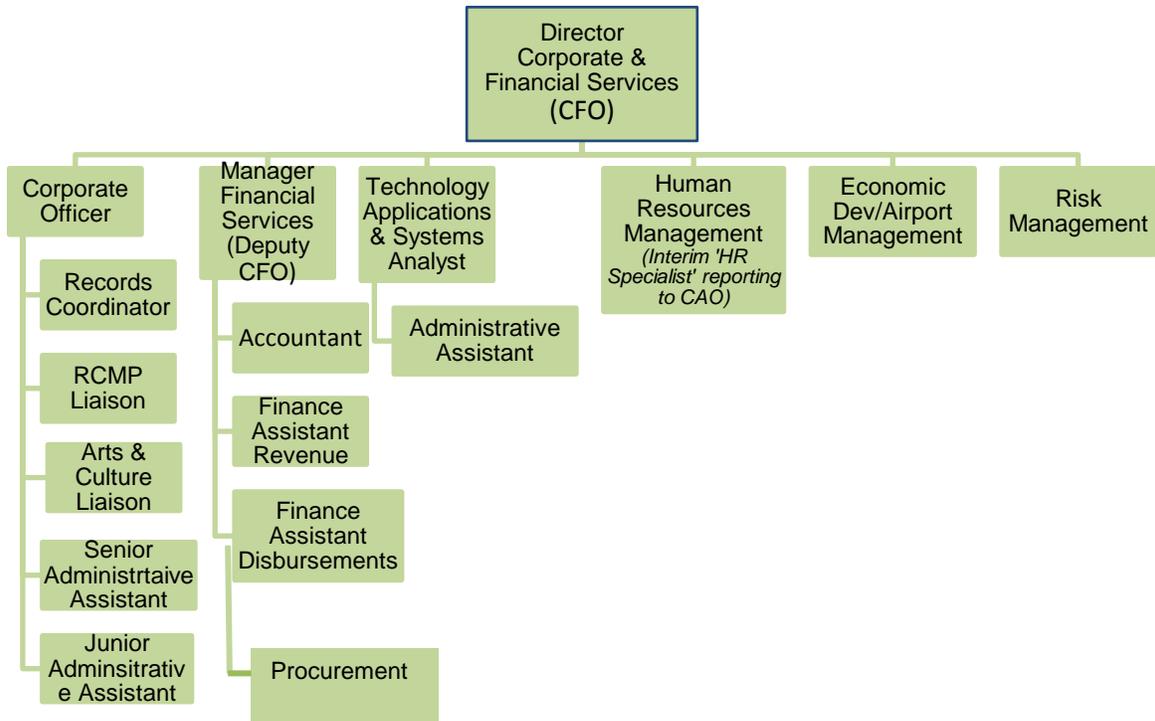
Current Organizational Structure 2015
Senior Management Excluded Positions^{63, 64}



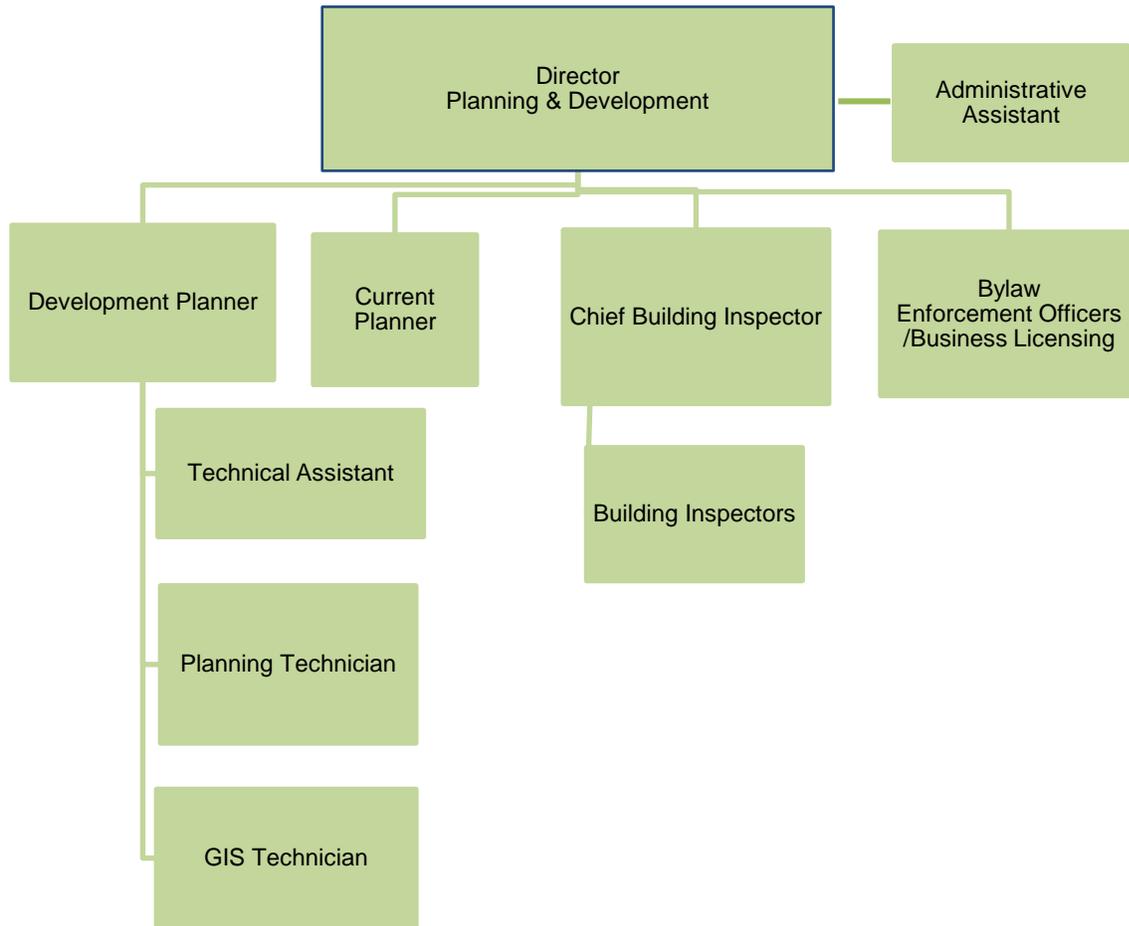
⁶³ RFP January 2015

⁶⁴ Current Organizational charts provided by the District

**Appendix 4.1.3 Recommended Organizational Structure
Corporate & Financial Services**



**Appendix 4.1.4 Recommended Organizational Structure
Planning & Development**



**Appendix 4.1.5 Recommended Organizational Structure
Engineering & Operations**

