



Ontario Municipal Chief Administrative Officer Survey 2019

A candid look at the issues on the minds of Ontario CAOs

■ DEDICATION

This Report is once again dedicated to Ontario's CAOs, whose commitment to public service and good governance continues to inspire our efforts.

This year, however, we also dedicate it to the provincial decision-makers and officials who work to create their side of the policy and fiscal framework on which the municipal sector depends.

Finally, we dedicate it to our colleague Michael Fenn, who was himself both a distinguished CAO and Deputy Minister of Municipal Affairs and Housing. Like Joni Mitchell, he could truly be said to have seen provincial-municipal love from "both sides now."

Readers of past reports will recall that Michael was a key contributor to each. At the time of writing, Michael is Co-Chair of Ontario's Review of Regional Governance, which required him to take a leave from StrategyCorp. We were honoured to lose Michael to such an important undertaking on behalf of the Province, but we have missed having his learned input into this years' volume.

Note : For the purpose of this document the term CAO refers to Chief Administrative Officer, County Administrator, City Manager and Town Manager.

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■ INTRODUCTION

Since 2016, StrategyCorp has surveyed the opinions of a cross-section of municipal city managers and chief administrative officers (CAOs) on a variety of topical issues. In past editions, we focused on:

- 2018: CAOs from across the Canada
- 2017: CAOs from Ontario's smaller and medium sized municipalities
- 2016: CAOs from Ontario's larger municipalities.

THIS YEAR, WE FOCUSED OUR INTERVIEWS ON TWO SUB-SETS OF ONTARIO'S CAOs.

- **CAOs of northern municipalities:** We interviewed a selection of northern municipalities, a category of community to which we wanted to pay more attention. Northern municipalities are particularly dependant on provincial transfers. We wanted to take the pulse of how they were faring at this time.
- **CAOs of upper tier municipalities,** which include Regions, Counties and Districts. They have deep working relationships with their lower tiers, with separated cities, and are themselves directly interested in the review of Regional Governance.

SURVEY METHODOLOGY

Twenty-five CAOs participated in the survey. Interviewees were taken through the questions set out in page 7 but were free to share what was on their mind in a frank, open-ended interview format.

Interviews were conducted verbally. In some cases, quotes have been edited for length and readability, or to ensure anonymity, without altering the meaning expressed by the participant.

We promised to respect their individual confidentiality, and to faithfully record their thoughts.

This report should be understood as qualitative, and not quantitative research. We do not hold our sample out as being a scientific sample capable of statistical analysis.

We also acknowledge that this year's focus on upper tier and northern CAOs does not give full voice to lower and single tier municipalities in Southern Ontario. In some instances, they would have their own unique perspective.

Nevertheless, we believe that the input of the participants is a frank look at important trends in Ontario's municipal scene. We continue to believe that further work of this kind would be valuable.

THE PROVINCIAL-MUNICIPAL CONTEXT

For the benefit of the casual observer, or of those from other jurisdictions, it is an understatement to say that there is a lot going on in Ontario's municipal world at the time of writing.

- Ontario is in the midst of a major restructuring of its fiscal framework. It has set aggressive targets for spending constraint with all its funding partners, including the municipal sector.
- Ontario is eight months into a Review of Regional Governance, which is considering boundaries, municipal governance, and service delivery responsibilities for eight regional governments and Simcoe County, which include 74 lower tier municipalities and serve roughly 4.5 million residents.
- Bill 108 had just been passed, changing land use planning rules, shifting the balance of authority over decision-making, and changing the ability of municipalities to make growth pay for growth.
- Structural change to health delivery in Ontario is creating Ontario Health Teams, which have the potential to drastically affect the governance of municipally funded health services, such as municipal homes for the aged.

In each case, major decisions are expected to be announced over the next six months. As a result, the time of our interviews could be seen as a time of "maximum uncertainty" about what would come next.

As a result of our focus and timing, this year's Survey is a deep dive into the challenges of local governments that are under significant structural and financial stress.

A DIFFERENT SNAPSHOT

Our findings have a somewhat different flavour than previous surveys, which we think captures a moment in time. We hope that the Report will provide a valuable snapshot of attitudes at this time when significant decisions were yet to be made.

It is also our wish that the Report may help inform some decisions, or at least be a catalyst for discussion about the state of municipal government in Ontario.

Again, we note that despite the many differences in the communities they serve and the approach they bring to management, the common denominator of those we interviewed was their fundamental commitment to public service, good governance and the importance of municipal professionalism.

■ EXECUTIVE SUMMARY: WHAT WE HEARD

What follows are summaries of the comments, observations, predictions and concerns of the managerial leaders of participant municipalities. From the interviews, several trends deserve to be highlighted.

“PROPPING UP THE HOUSE OF CARDS”:

One CAO described her overall experience this way, by which was meant the triple challenge:

- Managing the fiscal situation;
- Managing the uncertainty about restructuring, and
- Keeping the management team in place.

That neat summary described the overwhelming sentiment of the top three things keeping CAOs up at night.

FISCAL : THE SAME OLD “SAME OLD,” ONLY WORSE...

Fiscal stress has been a constant in every one of our CAO surveys. This year, it was worse, given the ambitious fiscal targets set by Ontario.

The continued mismatch between financial resources and service-delivery obligations is getting worse. Ontario really needs to do a re-think about the real cost of services, and how best to deliver them. To the CAOs we spoke with, this is not a question of “political tag” as between the province and municipalities, so much as a question of fairness in tax policy to citizens. If citizens are made to shoulder more of the burden via their property taxes, it will decrease the fairness of the way we pay for government.

MUNICIPAL RESTRUCTURING: “THE CAT CAME BACK?”

Since 2003, municipal restructuring has been the silent file in Ontario, and it was always wise to say of the previous government that “they would never do that...”. Last year we noted growing tension from the aging of existing governance structures and wondered aloud if we were approaching another period of restructuring activity. Enter the Ford government, and the Review of Regional Governance. Our interviews demonstrate that restructuring discussions have permeated the entirety of two-tier world, not just the Regions directly involved in the Review. We heard it is not clear if the business case exists to substantiate that the job needs to be done. There is also a lot of speculation if there is the political will to follow through.

THE “WAR FOR TALENT”

A key task of the CAO is to recruit and retain a top-flight management group. Aging baby boomers and competition for the best employees have always been challenging. This year, we heard loud and clear that the continued review of Regional Governance is making it unusually difficult to retain and recruit, as efforts are clouded by uncertainty about the future of municipal structures.



HOW TO MAKE THE PROVINCIAL MUNICIPAL MEMORANDUM OF UNDERSTANDING (MOU) WORK IN A TIME OF FISCAL STRESS:

Going back to 2002 when it was first inked, the MOU was created as a kind of provincial promise that downloading would not happen again without meaningful consultation. It was conceived as a sort of symbolic “Rainbow,” that promised a new relationship between municipalities and the province after the fiscal and restructuring “Great Flood” of the late 90’s. By and large, it survived the ups and downs that punctuated the times since 2002. The fiscal challenges today are, if anything, even worse than they were in the days after the Rae Government. The challenge for Ontario and the municipal sector is to work together in a way that is both decisive on the issues, yet reflective of the spirit of the MOU. Right now, whether or not its terms are being honoured, it does not seem to be delivering on the “spirit”, and the way CAOs feel is described by this observation:

“We understand and accept the right of the province to set the overall policy direction, but we don’t understand why it is not a two-way conversation.”

Listening to the comments of CAOs, we concluded it is time for another bilateral review of “who does what,” and how it is funded.

THE NEXUS BETWEEN HEALTH AND THE MUNICIPAL SECTOR IS GROWING.

Ontario Health Teams are a major initiative with great potential to drive innovation in the system by aligning budgets and service in a way that is truly patient centric. This has been a goal for a long-time and it could bring significant improvement to the health care system.

One area that needs attention is how the governance and control over budgets of Ontario Health Teams will fit with the requirements and norms of the municipal sector, when the two come together.

There is growing overlap between the municipal world and community health services, most obviously in Municipal Homes for the Aged. We heard considerable concern about how Ontario Health Teams would fit with municipal services and frustration over the lack of engagement between the Ministry of Health and the municipal world. This appears to be an area where considerable improvement could be made with better engagement and dialogue.

■ STRATEGYCORP'S OBSERVATIONS ON THE ATTITUDES OF CAOS:

This year, CAOs really wanted to talk.

Pretty much across the board, participants had an unusually high level of interest and enthusiasm for an opportunity to talk about what is on their mind.

First and foremost, they come across as very professional.

By their role, CAOs are not political. They are professional administrators. But they are still human beings. Even when given the chance of a private conversation, they do not tirade about cuts, change, or politicians. They are not "whiney" or "tax and spend" in their orientation. They genuinely want to be part of the solution.

They are up to the job of restructuring.

They are not defenders of the status quo. Overwhelmingly, they accept that the fiscal problems of the province need to be addressed. But they are experts in their own administrative reality, and they are concerned by provincial policies that they perceive as insensitive to their reality. As many articulated:

"Fiscal problems will not be solved by passing them on to the municipalities. There is only one taxpayer. And municipalities receive the smallest share."

They feel shut out as a sector.

"Consultation" is one of the most important, overworked words in public administration. Right now, the sector feels excluded from provincial decision-making, particularly on matters related to the intersection of municipal service delivery and healthcare. They do not blame individuals, so much as the overall haste of decision-making. It should be noted that this is not a new feeling. Many also felt "not listened to" by the previous government. At present, however, the stakes seem higher, making the concern somewhat greater, for reasons noted above.

"Hurry up and wait."

We are about a year into the new fiscal climate and eight months into the Restructuring Review. Really, what comes through from many is a desire to "get on with it"—provided that "it" is well thought through and implementable. Our sense is that they experience the current uncertainty around the Regional Review as a loss of control. They are leaders and implementers, and they are scenario planning and they don't know what scenario they will be expected to deliver on. That is trying for people who normally thrive on their ability to effectively plan and control.

It is a stressful time.

In listening to CAOs, we detected many anxieties, that ranged from fear of losing a job, to fear of not being able to provide certainty to employees, to fear of letting down the people who rely on the services they deliver.

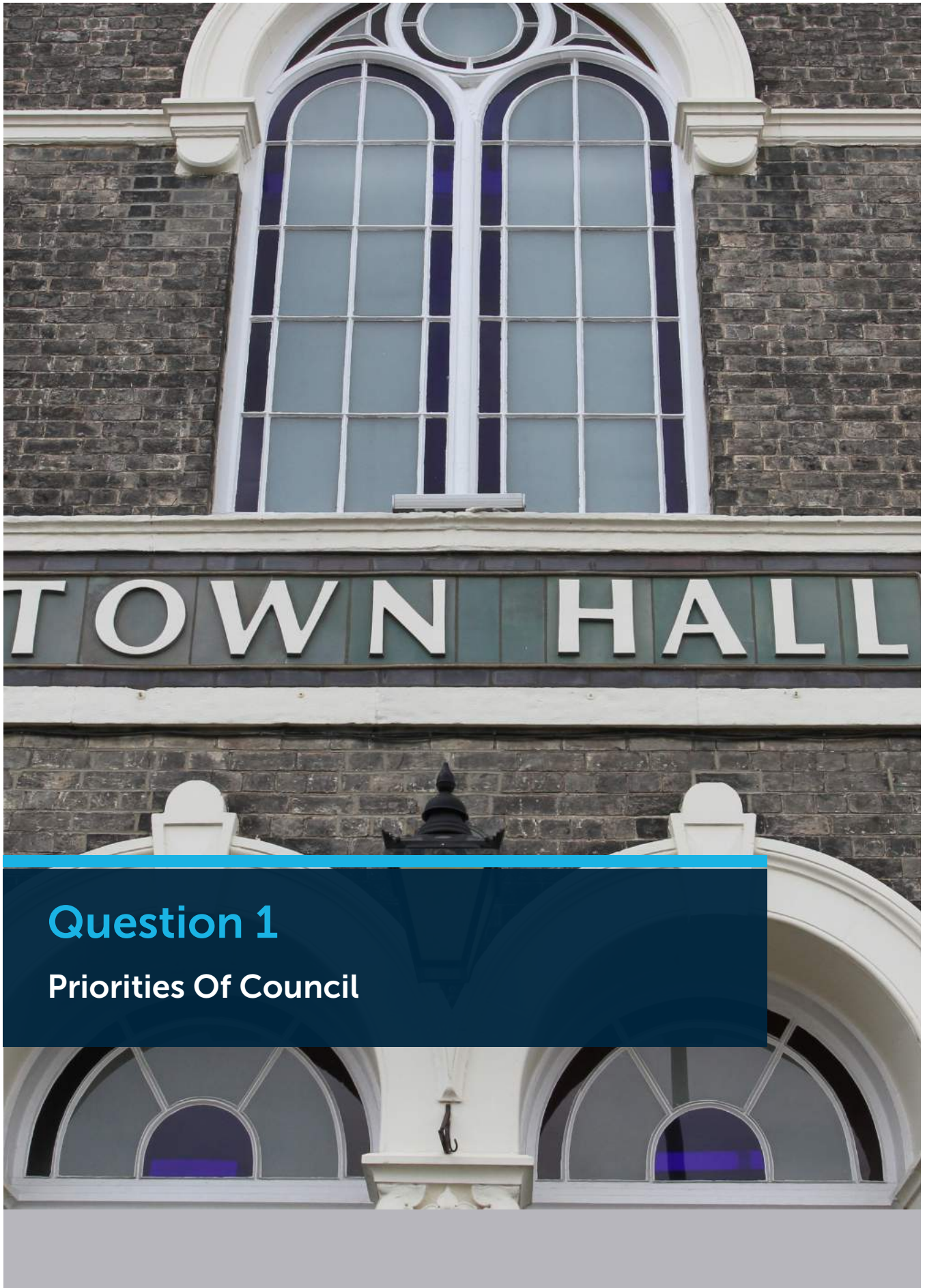
Morale matters.

If these CAOs are a snapshot of how municipal administrators are feeling, it is not trite to say that the overall performance of the system could be improved by trying to take measures to reduce the uncertainty, and lower levels of anxiety. As one CAO said:

"We want people to be creative and innovative in support of the public. You cannot do that when you are living in fear and uncertainty of what will come next."

■ WHAT WE ASKED...

- Q1. Priorities Of Council**
- Q2. Relationship With Government**
- Q3. Service Delivery**
- Q4. Climate Change**
- Q5. Cannabis And Substances Abuse**
- Q6. Technology**
- Q7. Communication With Citizens**
- Q8. Council-Staff Relations**
- Q9. Human Resources Challenges**
- Q10. What Keeps CAOs Up At Night?**
- Q11. Success Factors Of A CAO**
- Q12. Management Axioms**



Question 1

Priorities Of Council

■ WHAT WE HEARD...

The Planning Horizon

In previous surveys, CAOs stressed the need to have the right planning horizon as the foundation of their long-term strategic framework. "Long-term" does not have the same meaning to all, however.

Many respondents talked about having a long-term plan covering 10 or 20 years. For others, "long-term" means until the next provincial announcement or the term of council.

"We have a twenty-five-year strategy."

"We have a five-year strategy."

"We have a strategy for the remainder of this term."

"Our strategic plan came up with just under a hundred ideas for the year and the term."

"[In light of the expected cuts] we passed our budget after the election with the intent of making it a status quo budget with strategic planning to follow."

"We did a strategic session recently. The whole time to be honest was really talking about the next budget and Ontario funding cuts."

Uncertainty on funding

Given the importance of fiscal accountability to most councils, announced changes to provincial funding is a major stress and uncertainty in the face of provincial policy change came through in the answers of most participants.

"Council is not in a spending mood; we are already half-way through our year and I still don't know what I will get for EMS."

"Council is just trying to figure out what the province is doing."

For a few with the strongest fiscal positions, the current climate still means "business as usual," just with the challenge of heightened constraint.

"Council is focused on having long-term plan strategies in place, program service delivery reviews, we will like to see this done on a more regular basis."

Most, however, are more vulnerable to provincial policy changes on funding. As a result, they are shifting from longer term planning to reacting to change. This ranges all the way from deferring approved projects, to reconsidering their overall sustainability.

"Half of our townships are doing well; half are not. About three quarters of the budget of the weaker townships is from OMPF. They need to know what Ontario will do. We are focused on staying resilient in the face of that..."

"We just finished a new strategic plan with council. Our priorities have shifted from this term of Council from community type improvements to managing [the effect of] cuts..."

"Provincial announcements hit us hard. We have already started the budget process for 2020."

"The relationship is beyond difficult. The government is challenging us to find savings and to become more efficient. [...] The problem with this is that it assumes that we're all at the same starting point, and that we weren't finding efficiencies this whole time."

Concern is not just related to direct cuts to municipalities. There is also concern about cuts to entities jointly funded by Ontario and municipalities, which then lead to increased demands being put on municipalities.

"The changes to Conservation Authorities etc., they all point to the will of the province to download services to the property tax."

"They will just come to us, cap in hand, to make up the difference."

Uncertainty on governance change is also a major distraction.

As Ontario learned in the nineties, the prospect of local governance reform can be anything from a distraction to an obsession among both elected officials and staff.

"For several years we had been working on a visionary agenda that included housing, transportation, poverty reduction. Right now, the Regional Review is an impediment to all that. Council is losing focus on our long-term projects."

"Council has a huge fear that their community identity is in danger from the Regional Review."

"I just had a meeting with a brand-new CAO. He is worried he wouldn't even have his first day on the job and they will announce that this level of government no longer exists. It is on the back of our minds."

Concern about provincially imposed changes is not limited to municipalities directly involved in the Regional Review.

"Everyone just assumes that we are next."

"Council is worried about lower tier versus upper tier. Is the province going to put pressure on the lower tiers to amalgamate? I guess we may learn more at AMO."

"County council are looking at doing a governance review. People are suggesting we should be single tier."

Not everyone is concerned or opposed, however.

"I think that we are so small sometimes it's a challenge to deliver services efficiently or appropriately. I think single tier is something that we should consider."

"Not anticipating any impact from review here. We already amalgamated under the Harris Government."

Ensuring long-term financial stability/ Debt Reduction

Many participants identified fiscal accountability and sustainability as their key priority, both with respect to operating and capital budgets.

"A lot of council members ran under that banner to keep an eye on debt. It has become a go-to thing for new council members. Actually, we are not overly indebted, but my sense is that was easy for new councillors to run on and commit to."

"Asset management is our number one priority. We have a big burden just to maintain what we have in terms of roads, bridges, rolling stock. Quality and safety of infrastructure is top of mind to Council."

Making local government better

Respondents also referred to their continuous efforts to make government more efficient:

"As CAO, I achieved over \$10 million in savings over the last 4 years without compromising services. If this is not efficiency, then what is?"

"Our service delivery review has been on-going for a year. We are evaluating our structure and finding ways to do things more efficiently, such as centralizing back office functions and process redesigns."

"We are looking at things such as process redesigns. Looking at things from the customers point of view. Do all our processes add value? This will take time, but we are ensuring there is sustained momentum."

"We will have to transform processes-- the way things are designed. We are looking at structures. With provincial direction and funding, we can apply to ongoing initiatives: training, software, certification on staff receiving levels of training and continued process improvement."

Quality of life issues

Five interesting comments stand out as new or distinct from what we have heard in previous years:

Housing

Shortage of affordable and attainable housing has spread to new communities outside the GTA...

"Housing is a new priority, and if I'm being honest, that priority came more from staff than Council, but they understood and adopted it."

"Publicly without as much urgency [as transit], this Council is interested in affordable and attainable housing."

Developing the Local Labour Force

Some made an explicit link between economic development and the lack of housing and transit...

"Our businesses say they are not able to find labour force, in part due to the lack of attainable housing and transit for people who don't have access to vehicles."

Doctor Recruitment

"Health Human Resources is still a major concern..."

"We have lack of access to family medicine and we suffer an inability to recruit enough doctors. Many of the ones we have right now are retiring or close to retiring."

Indigenous Relationships

This is becoming a more urgent priority in northern communities with relatively large populations...

"We are working on trying to improve our relations, address concerns about racism, provide better support on social and health care."

Recycling costs

These were mentioned, with reference to delays in implementing enhanced producer responsibility, and heightened costs associated with the closure of Asian markets for recycled materials:

"Recycling costs are also enormous, and we have to figure a way to do this without breaking the bank."

The rural lens and the implications of service migration.

There is concern that service consolidation means decreased service levels in rural and remote communities.

"[Half of our lower tier municipalities] are concerned less about what Ontario is doing, and more concerned about what the separated City is doing. They seem to be moving into areas that have been the business of the County... In practice, "consolidation" of service delivery means "pulling out of rural and concentrating in the city."

"We look at everything through a rural lens because what they require is different from what urban municipalities require. We are really finding this problem in delivery of mental health and addictions and supportive housing. We are looking at taking over some services to guard against this happening [to ensure access for rural residents]."

■ STRATEGYCORP'S PERSPECTIVE:

Community needs are always evolving. As in previous years, CAOs report that their Councils have a variety of issues related to:

- improving the quality of life and;
- long-term financial stability and asset management, and;
- continuous improvement of government.

New this year was a preoccupation with uncertainty and the pace of change, and how it is disrupting the work of the Councils and staff. This uncertainty has diffused beyond the municipalities that are under review, causing a general feeling of not knowing what to expect in general in the municipal sector. Throughout this report, this becomes more apparent as different issues are delved into more detail in the following chapters.

The comments about different planning horizons were interesting to us, as they reflect a reality that we have found through our work on municipal strategic planning: there is no "correct, one size fits all, 'if you don't do it this way you got it wrong'" strategic plan style or horizon for local government. The important thing is to strive for a plan that builds the capacity of the municipality it is meant to serve. Authenticity to the community, and customization to the capacity of the organization are key.

Question 2

Relationship With Government



WHAT WE HEARD...

How is your relationship with the elected government?

Many CAOs commented on how very accessible Minister Clark has been, praising both his availability, and his strong background in municipal issues.

"I have seen Minister Clark now five times in less than a year. I have not seen any other ministers that many times in all my years. Accessibility to politicians in Queen's Park is much higher now."

"We meet regularly with Minister Clark, not only at conferences but also at meetings we have."

"Minister Clark understands our challenges, but we also understand his fiscal challenges. Sometimes Steve's Ministry wants us at the table, but another ministry might not want the same thing."

Most CAOs with MPPs in the government caucus described their relationships with MPPs as positive and productive.

"Our local MPP has been our local MPP for a while and his connections in this community are longstanding and deep. He has some strong views that conflict with council direction but generally he is a solid guy and has his community at his best interest."

"Generally speaking, our relationship is good with local MPPs about things important to us."

"Our relationship with our MPP is very good. He is a strong advocate and understands how we work. He has given us access to ministers and ministries. Now we are meeting ministers at conferences and having delegations accepted."

"We have a good relationship with our MPP. It is almost impossible however, for us to get general access at provincial level."

To many, political relationships and information channels seemed more important than under the previous government.

"For the last several years, with the previous government, the strength of our relationship was in cultivating good staff relationships. Now, it seems more important to have better political relationships."

"There is a lot of gossip from the political side of this government. Folks that are very much inside the tent seem to have an inside track on what direction might be coming."

"We used to get a heads up or direct communication when there is going to be an announcement. Now it comes from Premier or MPP to the Warden. Not from the Ministry to the Clerk."

How is your relationship with the public servants?

Some told us that their relationships with provincial officials are pretty much unchanged. Many noted that they put effort in keeping them strong.

"Relationships that we developed with staff over time are still good."

"We work hard to keep a good working relationship with the public service."

"On the administrative side, our relationships with bureaucrats are terrific."

Some believe that overall, with this administration, the public service has less influence on policy matters (relative to elected government) than before.

"In some respects [our relationship with the public servants] is less valuable as the Ministry is not well-informed about initiatives coming out."

"I feel they are sympathetic to our position, but they have to be neutral. They are doing the best that they can do in a difficult circumstance."

"I feel bad for provincial public servants. [In my opinion] since this government came to power, they are very restricted from having open conversations. That, or they just don't know what's happening."

Some noted that the conversations they have with public servants are less frank than before.

"The public service is much more cautious. They're just doing their job."

"[I can't blame them] They don't seem to know one day to the next."

"We have less reliance on the MMAH Regional Office now."

Staff turnover is blamed for some of the problem

"At the staff level, players keep changing."

"There is a real lack of historical knowledge and it affects stakeholder consultations. The right people are not at the table."

"It is difficult to develop and maintain relationships because things are always changing. Even Municipal Affairs, it changed last year so that all of our issues were dealt with by a different regional office."

The result is a lack of communication and a risk of being caught by surprise.

"It's been frustrating hearing about an announcement through an AMO email or through Twitter and that's how they are communicating."

"We are finding out things after the fact. Normally they used to call me to reach out but now there is no consistency to how news is spread."

Communications with MOHLTC were identified as a particular challenge.

"We provide paramedic services but don't hear anything through Health. We hear about it on social media. Just high-level summaries. We still have no details. This leads to anxiety and stress on staff who are seek information from us."

"Overall, communications [with Ontario] are very good but we are struggling to communicate with the Ministry of Health."

Overall, how is your relationship with Ontario?

Through their tone, most participants demonstrated that they successfully separate the issues from the people and successfully maintain relationships with their provincial colleagues, notwithstanding the conflict inherent in the policy climate.

"The relationship is still the same."

"I wouldn't characterize it bad. It is a good, professional relationship we maintain."

Some say that overall, it is different than before. Most understand the rationale and accept the overall direction of constraint.

"I would say relationship is different. There used to be more disagreements on how services were delivered. Now the questions are more fundamental."

"[With this government] we had a 180-degree change [in direction of policy] and everybody is rolling with the narrative. Everyone has to do their part."

"We are doing our best. We are doing our part. We can definitely improve, and we talk about opportunities to do that."

Some accept the direction, but question how changes are being implemented.

"We recognize the province's mandate is demanding, but we've got people to serve too. We need to work with the provincial government to get it done."

"We understand Ontario wants changes, but maybe they need to slow down and listen to people on the ground for ideas about changes they want."

"I have empathy for Province and the fiscal challenges they face."

Others are more open about their frustration.

"I don't think they even know what they are doing. I shake my head."

"They want us to plan, but they keep us uncertain and operating in fear [of cuts and governance change]. We want to do great work for the public, but you can't be creative and innovative when you are operating in fear."

"All we get from provincial government is 'you have to understand we inherited a bad financial situation from Liberals and we have to deal with it.'"

"I don't think Deputy Ministers have a say. I'm not sure where the decisions are being made. Even our developers are scratching their heads [about where and how decisions get made]."

"It shows the level of respect when you find solutions that genuinely work for almost everybody - instead of universal measures e.g. cut 5% to everybody, with no consideration where that would or could come from."

Lack of consultation creates the perception that decisions are being made without municipal input.

"We did not get a chance to voice our issues with ministries."

"There has been a loss of municipal voice in decision making."

"They're holding their cards pretty close. We took our environmental work and created a document that shows how we're aligned with their provincial government. We didn't even get a response."

What was your reaction to the municipal efficiency funding?

The Municipal Efficiency funding is a nice example of the different perceptions of government action. It met with mixed reviews. Some thought it was a good experiment and appreciated it. Others saw it as almost insulting.

"We really appreciated the efficiency dollars...a bit of an experiment, but one that helped; we looked at equipment to put on to graders to eliminate need for external contractors, for example..."

"They gave us a one-time cheque to find efficiencies just so the province can say that they gave funding. But this does not mean that there are things there to find and cut."

"Why does the provincial government assume that we're all starting at the same point and we haven't been finding efficiencies this whole time?"

What are you doing differently?

CAOs are building their capacity to intervene in provincial affairs.

"We have sent more letters of suggestions to this government than we have ever before."

"We are working together regionally as CAOs to build our case to present to the provincial government."

"We are trying to build data to show them the effects of the changes."

"We are trying to show our willingness to help them solve their problems."

"We advocate for a transparent and open process."

"We hired a lobbyist to help us with transportation issues."

Most CAOs reported that they try to focus on maintaining a positive, or at least measured tone in communications with the government.

"First provincial cuts started coming out in May, particularly in public health. Went to a meeting with Councillors, and my advice was to tell them not to overact."

"We're doing our homework and coming up with suggestions and try to work behind the scenes."

"I told [Council] not to go punch the government in the nose, but to work with our local MPPs because they are the ones that can affect change."

"Don't go and criticize government, unless it's absolutely egregious. It was difficult to get the politicians not to fight in a public way, but they are pushing back and engaging with the province."

CAOs stressed the importance of AMO, but also local associations, such as EOWC, WOWC and LUMCO in advocating to government.

"[Ontario] pays no attention to us individually. We work through our Regional Warden Caucus."

"Through our Warden's Caucus we get a good response from MMAH."

"We have lined up 3 delegations for AMO, but we haven't heard back yet."

■ STRATEGYCORP'S PERSPECTIVE:

The question of the municipal relationship with the provincial government dominated the interviews this year.

As the old adage goes, in any negotiation, it is necessary to separate out the issues from the people. Focusing on the "people", CAOs:

- Appreciate the heightened engagement at the political level, particularly by MMAH Minister Clark. They stress the importance of the MPPs as channels for information.
- Find their relationship with public servants still professional and positive, but overburdened by the pace of change, and the centralized style of decision making of the government.

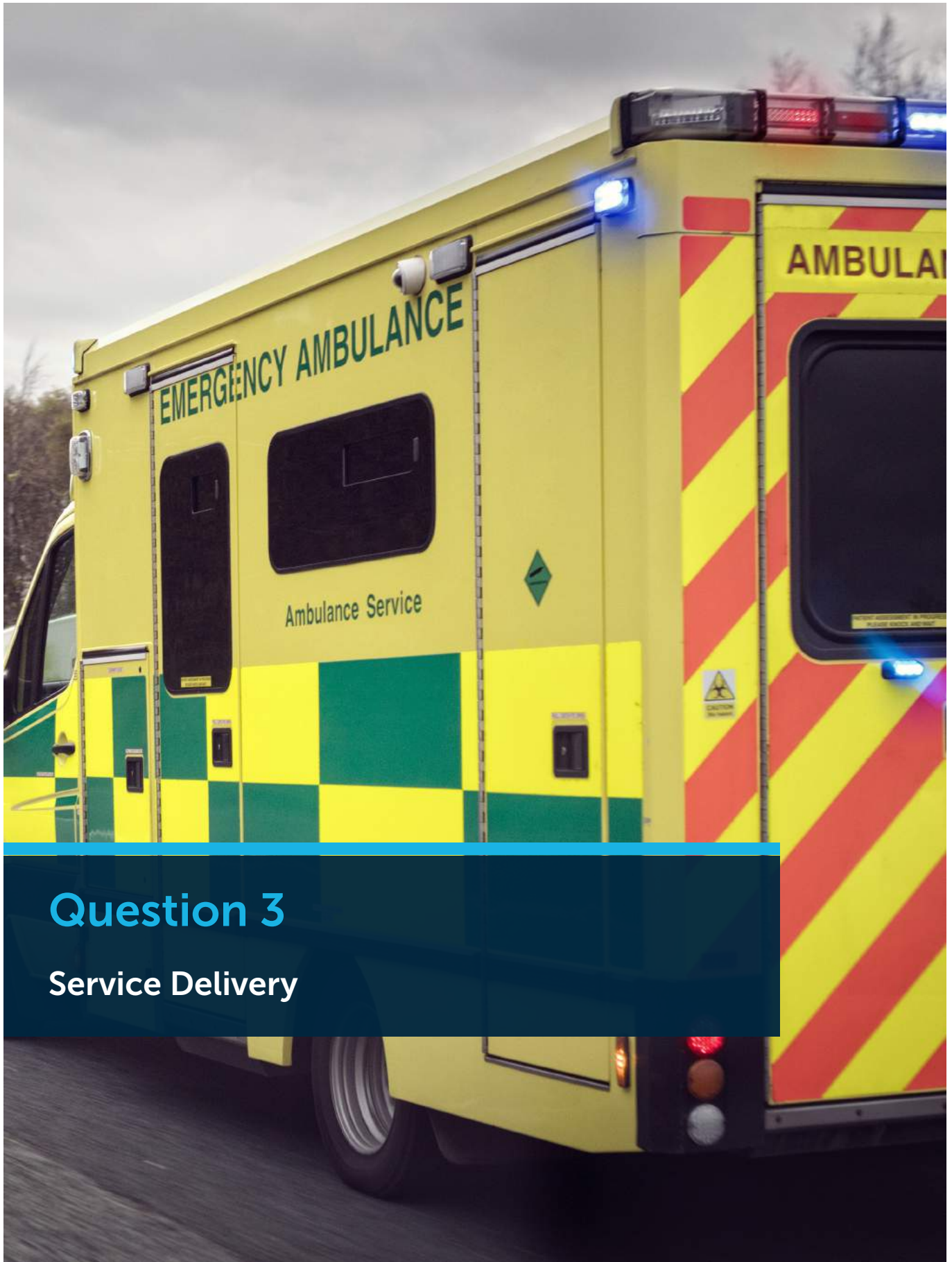
Turning to the issues, where Ontario's relationship with municipalities is concerned, there are two main "elephants" in the room: fiscal challenges and the structural changes that could come from the regional review.

- CAOs understand and respect the need to address the fiscal situation. They are concerned about one size fits all solutions and an overall lack of meaningful consultation and information flow during policy making.
- They are concerned about the distraction that comes from the Regional Review.

To improve their relations, they are stressing the importance of collective action through associations, such as AMO, but also specialized voices such as LUMCO, EOWC and WOWC*. They are also working to improve their advocacy skills, by building better business cases and sometimes engaging external lobbying assistance.

"The comments about the lack of communication between the Ministry of Health and the sector should not come as a surprise. The Ministry has a vast array of stakeholders and a vast health care restructuring plan to manage. Add to that the fact that the sector and health have always had a somewhat distant relationship. Nevertheless, this relationship is important, and should be improved. Many forget that since 2006, "health" has been an enumerated head of municipal responsibility under the Municipal Act. The days of municipalities being exclusively about "potholes" and "garbage collection" are long gone. In spite of all the other "jobs in the job jar," it is time for the Ministry and the Municipal Sector to build stronger working relationships to reflect this new reality.

* AMO (Association of Municipalities of Ontario), EOWC (Eastern Ontario Wardens Caucus), LUMCO (Large Urban Municipalities Caucus of Ontario), WOWC (Western Ontario Wardens Caucus)



Question 3

Service Delivery

WHAT WE HEARD...

Ambulance and EMS

Almost all respondents who are responsible for EMS and Ambulance services mentioned that this is a service line that concerns them gravely. They feel that they are asked to make cuts when they have planned asset upgrades or replacement and budgeted for increase in capital spending as a response to aging population.

"Our paramedic services too – we are one of the municipalities that got caught in the timing. We implemented a large service enhancement, and the cost of that enhancement was going to be municipal. We are concerned about uncertainty and meeting the demands of the community."

"The ambulance service no longer does transfers. They are busy at night as they are during the day."

"With announcements coming on health units and EMS, we will be asked to pay for those services, but we may not have had any input into what they can look like in our rural communities. This will weigh on us heavily."

"Paramedic services are in so much flux and they keep us up on at night how to find resources."

"Anything in health is complicated just with all the players we have in health care. So many players in the game here."

Social services

Some of the responses reflected a rural-urban divide, and a dismay for services moving towards urban centers while de-serving rural communities.

"Childcare – it is one of those areas that really needs review. The increase in funding and support that has been provided in childcare is obscene, to the point we advertise to give money away because we can't spend all the money. We got provincial funding for childcare. It creates

a lot of expectations and its resulted in increase in funding and additional services that don't make sense. Once you have a service, it's difficult to get rid of it. We are concerned about the impact about that on the community and staff."

"There is a growing homelessness problem that almost overwhelmed our ability to deliver services. We do not have an overnight warming shelter. In the absence of upper level support, there are people coming from FN communities into the city."

"The urban model for social services does not necessarily work in a rural context."

Housing

Housing affordability is an issue observed in most of Ontario, even in rural municipalities whose economic development depends heavily on potential employers being able to attract new employees into the municipality.

"Attainable housing is a big issue."

"In terms of things like housing, everybody is concerned about this and how you make it affordable for the general public. The school of thought says it's like roads. Increase in supply doesn't solve the problem. It is almost like the more there are, the more it costs."

"We have come to the conclusion that for our median income family there's no housing that is available and affordable in our county, whether rent or buy, at a \$30/ hour income."

"If we do not figure out how to address the housing issue, either employers will go where their employees can afford to live, or we will be pushing our residents to poverty for overpaying for housing."

Long-term care

Long-term care was the service for which the most concern was expressed. All CAOs expressed that the needs are increasing while the funding is decreasing. Some even questioned whether it would fit best with the healthcare system instead of the municipal.

“Aging of residents is becoming significant and the funding doesn’t match it. It has become an impossibility to get enough staff on any given day. We are short 10% every day. That creates a whole lot of other problems because the staff that are available end up working additional hours, and the cost spirals and it’s an ever-going problem.”

“Long-term care: biggest concern.”

“The Municipal Act for one home is bizarre. It is part of the health care system and not a routine in the municipal sector. It is well aligned with health and that is where it should be.”

Water and wastewater

Most CAOs expressed confidence in the efficiency with which water related services are delivered and their financial sustainability.

[By an upper tier CAO:] “Water is more of a lower tier issue, but we’ve had conversations about the upper tier delivering water and sewer in some cases. If it’s a concept of shared services and we’re open to discussing it.”

“The good news is that for water and wastewater we have financial sustainability.”

“Ontario helped by making a legislative change to unbind us with the labourers and carpenters’ union.”

Economic development and land use planning

Some CAOs, of both upper tier and northern municipalities expressed the permanent

challenge of incentivizing growth while protecting the local culture and community.

“For economic development and growth, how do we manage expectations? There is concern from the public around government overreach.”

Policing

Overall, policing and public safety was not mentioned as an issue or service area of concern this year. There were some mentions, however, about how policing and public safety strategies and services can become more coordinated with other areas, such as public health.

“Community safety and wellbeing is such a complex issue: not policing, but behavior in the community; how to change the way we live to reduce the need for policing; looking at things where they have demonstrated how to reduce violence through community initiatives. We are developing a multi-disciplinary plan and working with public health.”

IT sharing

Approximately half of the upper tier CAOs interviewed recognized that there are opportunities in IT infrastructure sharing or in lower tiers using the professional services of the upper tier. One northern municipality CAO mentioned that they are sharing their IT infrastructure and maintenance with another public sector agency in the area.

“We work together with lower tiers on Information Technology and we invite them to take advantage of our professional services.”

Municipal finance

The need to explore new municipal revenue tools were recognized by a third of the upper tier CAOs we interviewed. Infrastructure and maintenance with another public sector agency in the area.

“We need to find new funding models - I am concerned about infrastructure funding gap.”

"We're just suspecting another OMPF cut. Even if it happened though, it doesn't affect us that much. But there is concern for whatever downloads come down the pipe - whatever it is we will have to absorb it. We're a very rural municipality. They're looking at providing support to municipalities that are truly rural. Hoping that they will protect us. Province must look at the metrics. There are cases where it's 40-50% of their Operating Budget. Hopefully their cuts are not that drastic."

In northern municipalities, particularly ones whose local economy is dependent on resource industries, admitted that the current municipal revenue options have reached their limits for funding infrastructure in Northern Ontario.

"We are almost due for reassessment of property taxes. We may need more tax revenues to maintain from the effects of our mines. One mining truck is the equivalent of 10,000 vehicles on our roads. This is a huge impact on our roads. We get very little from the mine."

Overall, the public is concerned about quality of services and levels of taxation

Not surprisingly, CAOs participants report that they perceive the overarching public concern as being the municipal services "value for money equation."

"Universal issues are affordability and taxation. Everyone wants to be assured tax money is not being wasted."

Relationship between upper and lower tiers in time of change

"The county is only as strong as its weakest link - this is our operating principle at the county. We must work together with everybody."

"There are a couple issues with the service review. One of them is that all provincial transfers go through the upper tier (public health, conservation authorities, EMS, social) - until the province announces its intentions, the service delivery cannot be realistic. The bottom line is that the lower tiers are not sustainable the way they are. What are we actually trying to achieve?"

■ STRATEGYCORN'S PERSPECTIVE:

Overwhelmingly, participants were most concerned about potential financial impacts on services beyond their ability to absorb without significant disruption to the service level they provide or a tax increase on their ratepayers.

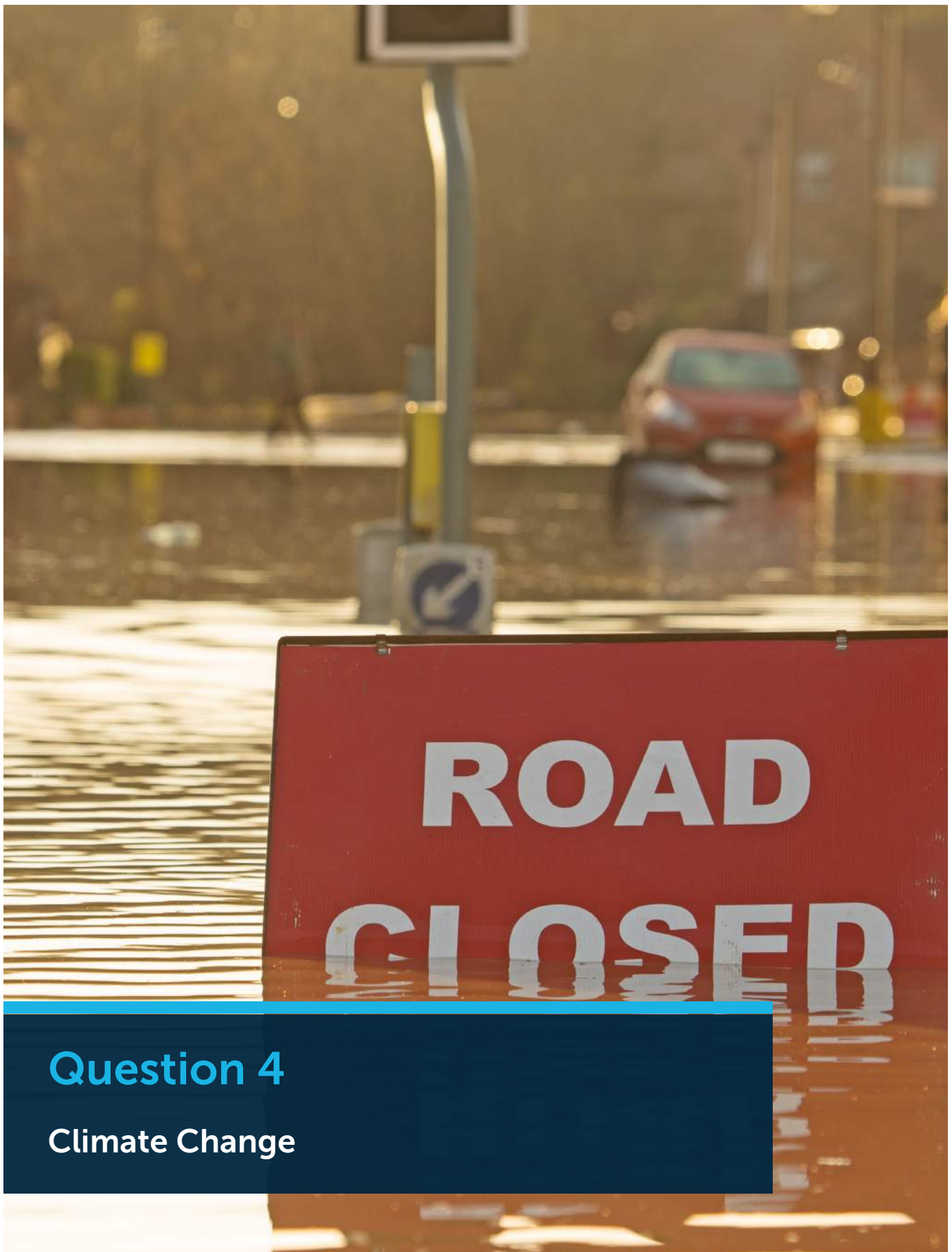
On the revenue side, some CAOs mentioned the need for the Ontario municipal sector to systematically explore alternative municipal revenue tools. It was expressed that the current available revenue options are testing the limits of maintaining the minimum necessary infrastructure investment and supporting service delivery at current quality standards (eg. EMS).

These municipalities take great pride in the quality and effectiveness of the services they provide and are concerned about losing the management of service that they have come to understand and manage to a high standard.

For example, they feel they have managed to provide reasonable response times to rural areas under their management; something that they fear will not be continued by a more regional agency.

Services not perceived to be under threat either in terms of financial impact or changes in mandated service standards did not receive much comment as they felt that these services were secure and simply a matter of continued good management.

Counties are very much concerned about rural Ontario and fear that solutions designed for urban areas don't always apply in the same way to rural areas. They feel they are in the best position to manage these issues in their area.



Question 4

Climate Change

■ WHAT WE HEARD...

Progress is being made. Plans are under development, or already in place

Most participants told us that they have investigated climate change, engaged in discussions around it and are in the process of formulating a plan to deal with it.

"We are working on a plan; we have staff working with municipalities to create a plan. We already have an inventory at a county level, but we want to do an inventory at a municipal level and with the community."

"Our climate change strategy will also be an agriculture development strategy."

"We have an energy efficiency plan."

"We are working on a plan...the conservation authorities have been wonderful partners to us."

"We hired a climate change coordinator two years ago. Plan is being coordinated with key stakeholder groups."

"We have the strategic plan and a council resolution to direct staff to bring a report on how we will go about creating a climate change plan."

"We have a small team dedicated to this. We have a climate change master plan....looking at climate change on our operations."

Some are still lagging...

Some respondents told us that they did not have a climate change plan in place within their municipalities.

"To be honest, I don't think we have an active climate change plan. We just look for energy efficiencies in our operations, facilities and homes...We don't have specific initiatives."

"We don't have an overarching plan...it is on the radar."

"We don't have any plan, and it has not been a discussion point or a priority."

Practical approach needed in dealing with operational and funding demands

Our respondents are taking a long-term approach to climate change in order to ensure sustainable solutions.

"The initiative is coming from infrastructure. We have more flooding now than before. We have to build them in a way that can withstand the next water disaster."

"We are looking at technology, using vehicles for ploughing and grading that are more efficient."

"Most of the initiative is coming from our winter maintenance budgets."

Northern rural municipalities are taking action with regard to climate change

Our interviews with northern municipalities reflected climate change as a priority, with most already embarking on mitigation strategies.

"As a northern town, we have a climate change coordinator through an FCM program."

"We have implemented some efficiencies in modernizing our assets and wastewater plant."

"We have flood mitigation management plan in place."

Responses varied as to where leadership on climate change originated

Our interviews revealed that the climate change initiatives in municipalities did not always originate from an alignment of public, council and staff. Some report that it's not easy get public, council and staff alignment on addressing climate change as a priority area:

"In rural areas, a lot of farmers are leading the charge on this issue."

“Younger members of council are interested.”

“There has not been a lot of leadership around the council table for it.”

“Most of the council is convinced and concerned about climate change.”

“Our initial plan to deal with climate change is within our own administration, but it is difficult to bring it to county council. They don’t want to take ownership for it.”

■ STRATEGYCORP’S PERSPECTIVE:

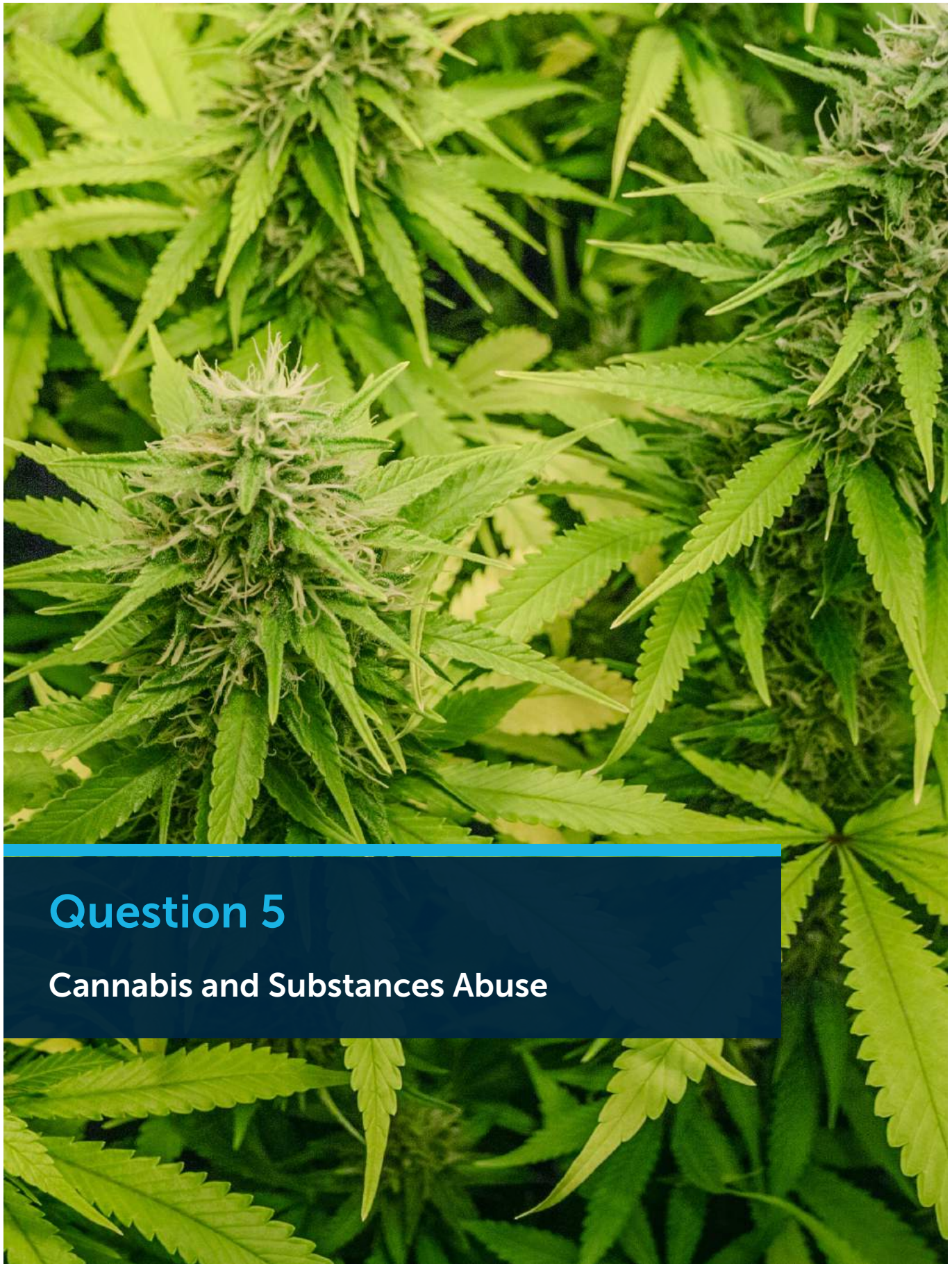
As extreme weather events, such as severe cold, floods, wildfires and heat emergencies, continue to occur in communities across the country, there is greater public awareness of climate change impacts, and the need to take action.

As the CAOs indicate in their comments this year, an increasing number of municipalities have developed plans, or in the process of putting them in place. However, it must also be noted that in some communities, there is still reluctance in recognizing the need for municipal response to this issue.

In terms of the details of the Climate Change Plans, CAOs highlighted that

a practical approach must be taken because of the operational and funding parameters and limitations. A focus on improving existing infrastructure is one of the highest priorities.

Finally, the northern rural communities have a greater appreciation of the impact of climate change, and the public, such as the farmers, are influencing provincial and municipal elected leaders to take action, and in turn, enable CAOs and municipal administration to implement action plans.



Question 5

Cannabis and Substances Abuse

■ WHAT WE HEARD...

A range of experience with respect to opting in or out...

Our interviews with lower tier municipalities reflected the diversity of local communities across Ontario, with some towns opting in for cannabis stores while the majority of them opting out.

"Lower tiers are struggling a little bit. They recognize that it makes sense, but they don't really want it in their communities. Those councils will determine if it's something they want to take on or not."

"I think we only had 2 municipalities that opted in. The online service is up and running."

"There was a flurry of activities about whether they should support a storefront in the downtown. Staff and Council approved the store front. The province has not opened yet a storefront."

Not a big issue, so far...

Lower Tier: With respect to the impact on the municipality's decision making and adaptation, there was unanimity among respondents that the implications were minimal.

"On cannabis we have changed some of our policies. Other than that, it doesn't impact us. It may have affected some communities like arenas or schools etc., but it really hasn't impacted us yet."

"The city's practical involvement is limited to building inspections."

"We had a change in some of our policies to include recreational drugs. Overall, it has not had any impact."

Upper Tier: Similarly, respondents from upper tier municipal governments told us that the cannabis legalization had insignificant impacts to their communities and Councils.

"It's not really an issue."

"The impact was not as extensive as people thought it would have been."

"It is not an issue for us as an upper tier."

"It was a non-event."

"I must admit; it is not as big a deal as we thought. Regional police have helped with this as well. We did a good job in pulling together local municipalities on this issue. It seems to be reasonably under control."

Burden on municipal services and costs

Most respondents told us that the first year of cannabis legalization has had low impact on municipal expenses, limited mostly to training and education of staff and community groups.

"We don't have costs for it other than some training and protocols for paramedics."

"There hasn't been a rise in policing."

"Police and public health never had issue with cannabis this past year."

"There have also been illegal dispensaries in our region. We are working together with police, providing education support with school board as well as emphasizing check mechanisms. We are working with our health partners."

Areas of Concern

Possible effect of edibles

Some respondents reported that there are concerns about the possibility of overconsumption of edible and topical cannabis derivative products.

"Another thing of concern is edibles. We are looking at how we can manage this."

"We are concerned about edibles and topicals."

Smoking in Public Places

One area of concern to some CAOs is where it is permissible to smoke and how that relates to efforts to constrain tobacco consumption. Both public and indoor smoking came up, particularly

with reference to social housing. One explained that the municipality is trying to work on narrowing the breadth of the federal regulation by exploring bylaws and guidelines.

“Our concern is how do we manage consumption in public places. Our approach is to enact smoking bylaws.”

“As a municipal government we say you cannot smoke in public for public health reasons, while the federal and provincial governments say you must smoke it at home.”

“We just introduced smoke free living policies when the feds rolled out legalization of cannabis. We are saying you cannot smoke in your units because of second hand while the federal policy is saying the only place you can smoke is in your home. So, we are working to figure out how harmonize these approaches.”

Industrial aspect

Respondents from rural municipalities that have been destinations for industrial growing operations explained that municipal staff work with these businesses primarily on zoning issues and that Council’s or the community did not pose any significant opposition.

“We got applications for grow ops - it’s on the zoning side of things. Many are routing through the system. There’s barely any opposition for an industrial area that will be manufacturing medical cannabis. The agricultural community cannot grow outside, it must grow inside.”

“Our staff has had conversations with industrial growers. We’ve been dealing with it at least on some level.”

Other substances

While all respondents agreed on the insignificant burden of cannabis on municipal services, several reported concerns about the increasing frequency and implications of fentanyl and how they are trying to tackle their local opioid crisis.

“Fentanyl is a big issue. There’s a summit that is driven by a lot of the Councillors and the Mayor, because there have been several fentanyl deaths.”

“On the opioids side we have policing issues, but not for cannabis.”

“The opioid crisis is big in our northern municipality and it is causing problems with violence and homelessness, and it is a burden to EMS.”

“The municipality has a drug strategy, and it has a designated staff to coordinate the actions of all relevant stakeholders and has a community strategy about it.”

Our favorite response

“We are high on it.”

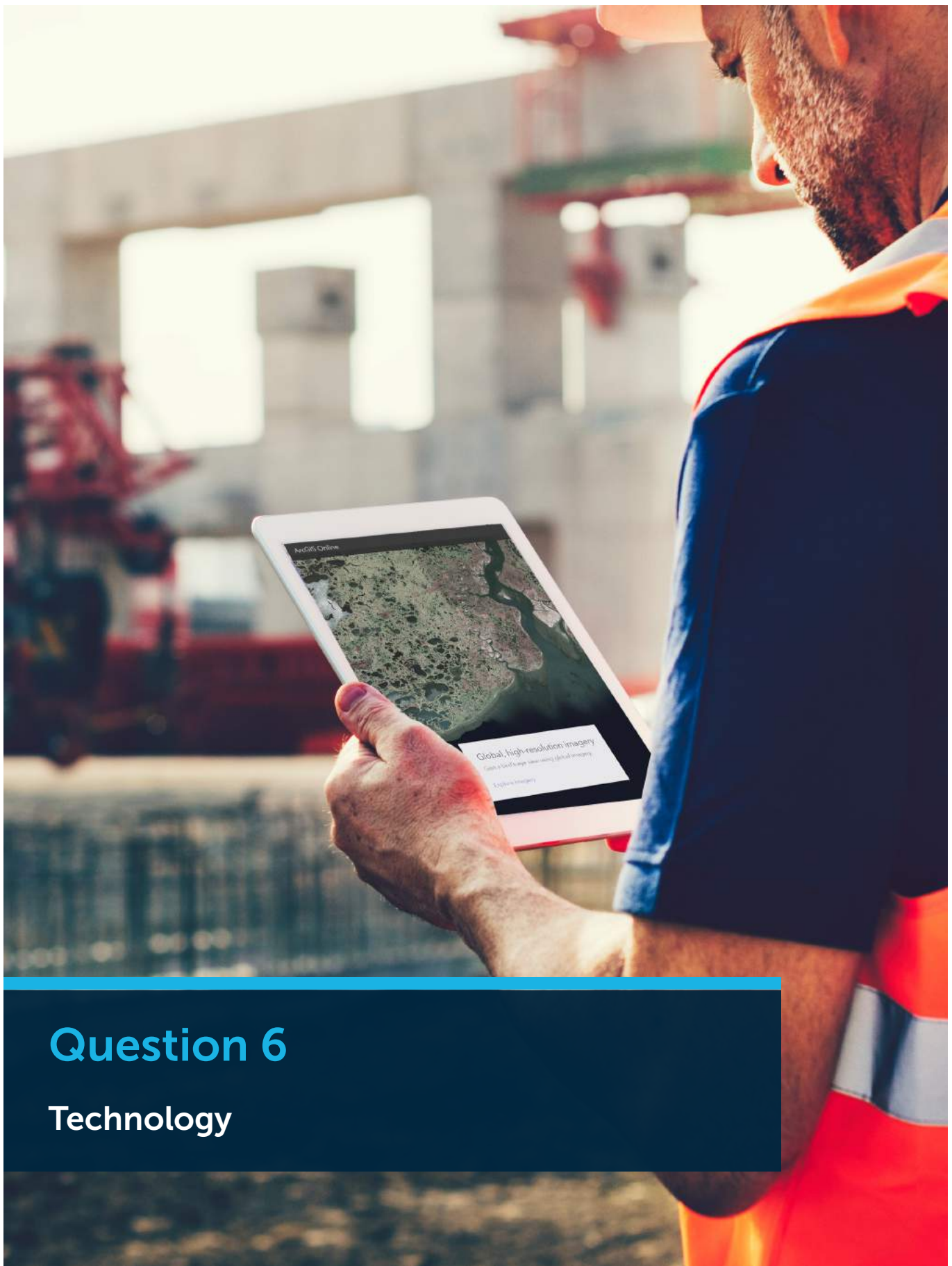
■ STRATEGYCORP'S PERSPECTIVE:

Overwhelmingly, the CAOs that participated in our survey explained that the legalization of cannabis has not been a major issue for their municipalities. So far, at least, it has not had the major municipal impacts on costs or operations that some had feared. CAOs have their eye on the legalization of edibles this Fall. Some caution that users might be unaccustomed to their benign form and delayed effect. Impacts, particularly on youth and seniors, will have to be monitored.

With less than a year's experience and statistics on the legalization of cannabis, it is too early to reach any definitive conclusions on its impact.

However, the legalization of cannabis has allowed police to focus increasingly on more serious crimes and other substances such as crystal meth, cocaine, heroin and other opioids. CAOs, especially of northern municipalities, report that opioid abuse is the real crisis, with serious social impacts, and burdens on municipal and health care resources.

Overall, compared to cannabis, participant CAOs are much more concerned about the growth of the opioid crisis. The consequences in human suffering, as well as increased demands for health, social and emergency services are having serious effects in many communities.



Question 6

Technology

■ WHAT WE HEARD...

Technology use and innovation for the municipality as an organization

Most respondents, and especially upper tier municipalities are adopting new digital technologies to bring efficiencies to customer service and create more flexibility to the workplace. The wide range of technologies creates opportunities for streamlining and service sharing.

"We have a public sector cyber network that we are building. This is one of the goals we are building on our major corridors. For example, automated speed control, and updating our fleet."

"We have a new digital strategy that we are rolling out using a cloud-based software solution."

"We are doing a lot with remote work. Half of staff work from home thanks to technology."

"Our next technology is integration. We have too many technologies and none of them are speaking to each other."

The most rural municipalities, however, expressed that they are behind in technological adaptation.

"Not so much new technology. We are still so rural, and it is expensive for people to get connecting. Until broadband expands, I don't see us taking advantage of technology."

"We are also not large enough. I don't want us to introduce software just so someone can see what their water consumption is. It is not high on our list. It is more so getting people connected. It will help with commerce and communication with citizens."

Technology sharing between municipalities is the answer for many

Many upper tier CAOs reported that they provide or coordinate IT services for their member municipalities.

"The county does IT for all 4 member municipalities, we've been slowly streamlining platforms for virtualization of our services. There's no one silver bullet, but certainly getting all member municipalities on the same software would be progress. We're taking an incremental process at it."

Cyber Security is the big concern...

With many widely reported incidents of ransomware, CAOs are taking the cyber-security threat seriously.

"The IT manager insisted that cybersecurity is a priority on the strategic plan."

"Threats are constantly evolving. Our IT department is on it.."

"We're looking at developing a new enterprise risk management program. Right now we have insurance, but it's unclear what it covers should we be the victim of a cyber attack. We're working on that as part of the ERM program."

"We try to be proactive with cyber security threats and training as best as we can. We have mandatory training for our staff which I attend. We do internal testing and make staff take tests and do things that emphasize the importance of it."

"I think it's not so much the software or hardware that you have, but the people in the organization monitoring and dealing with this issue."

"We have dealt with cyber security issues. We have had some small attacks but we have dealt with them. We increased training and insurance. Taking steps to reduce the risk."

"Both upper and lower tier are beefing up their cyber security to strengthen network security."

Examples of areas where municipalities are innovating

Each municipality is at its own point of progress in IT innovation. When asked what was “the next thing” they planned to implement, we got a wide range of answers.

IT strategy reviews

“We are doing a pretty extensive technology review now. We are hoping to do more integration than automation.”

Fleet management

“The next thing I will like to roll in is an internal GPS system to roll out the municipal fleet to better manage fleet and improve utilization.”

Adoption of 5G technology

“Close the cell gap and prepare for 5G.”

Implementing geographic information systems

“The next thing I will like to roll in is an internal GPS system to roll out the municipal fleet to better manage fleet and improve utilization.”

Software to streamline internal operations

“We are looking at internal operations about new kinds of software for payroll and HR. We’re always open to new technologies and we’re looking at investing heavily in our IT department.”

“We have been looking at software to ensure and track alignment with our strategic plan and service delivery initiatives.”

“We have a good council in handling data that is put in front of them. Our ability to present this data is constrained and we want to improve this.”

Disruptive technologies

A disruptive technology is one that displaces an established technology and shakes up the sector. Or it may be a ground-breaking

product or innovation. Organizations that fail to account for the effects of new, disruptive technology may find themselves falling behind the technology and innovation curve by not discovering ways to integrate the technology into new processes and business solutions.

“I don’t know if it’s disruptive but drones in our community. We have a decent size airport here and it is a bit of a problem.”

“We’re seeing automated vehicles and other disruptive technologies coming, but at the local level we don’t know yet what it’s going to do.”

“We took over business licensing that was managed by regional police. The Uber and Lyft services are here too. We uploaded this with support of local municipalities in June.”

“We are taxing Airbnb’s just like we are taxing hotel rooms. We have appropriate bylaws in place for ride sharing.”

■ STRATEGYCORP'S PERSPECTIVE:

Municipalities are focusing on innovation to improve their existing core services and offering more digital services to a population that is more and more reliant in digital interaction with the world.

Participants are committed to IT as corporate infrastructure essential to the operation of the municipality. Almost all participants referenced that they are being guided by a digital strategic plan that allows them to focus the limited resources invested in technology on the areas with the greatest return to the citizens.

Given the constantly changing world of what is possible, it is not surprising that none are wholly satisfied with where they are at in their evolution. Keeping pace with change and having the funding to invest in upgrades would appear to be the big issue. Inter-municipal cooperation is a strong enabler.

The threat of cyber crime looms large with many participants. Where threats are constantly evolving, many express concern that they could be the next victim. CAOs report that they are taking measures to audit the security of software and train staff in risk awareness.

Broadband to all rural areas continues to be a priority for county governments. Fast internet access for all is seen as necessary for ordinary citizens to manage in these times and to attract and retain businesses in rural Ontario. In this regard, recent provincial and federal funding announcements about upgrading access to digital cellular services were welcomed.



Question 7

Communication with Citizens

■ WHAT WE HEARD...

More confidence in using and managing social media

All respondents have fully adopted the use of social media, but most are still trying to find the best balance of maximum outreach to residents and their most effective communication channels.

"We are using Twitter and Facebook to help us see what the community thinks on projects like our rapid transportation system."

"We've expanded our social media exposure to include Twitter, Facebook, and Instagram. We integrate them in our website."

"Whenever we are looking for feedback, we use social media and other platforms."

"We are using social media more. There is also chat-bot programs on our website.... Staff are measuring this to see how much we should reduce call takers."

Face-to-face meetings still very important

While alternative channels, such as social media and internet livestreaming, have created the opportunity to engage with more citizens, the personal interaction of both formal and informal public consultations is still very useful.

"We do a lot of go-to-the-residents and citizens events and have them sign up for different social media platforms."

"Meeting face-to-face and engaging people about what matters and discussing how to build communities."

"Using easily portable things at events to engage directly with the public."

"We have an open house every year and invite all the schools."

Communication planning & combining digital and traditional engagement tools

Approximately half of the CAOs we interviewed indicated that public communications are gradually perceived a more proactive than reactive matter. Improved communications are either explored in separate plans or are mentioned as priorities in Councils' strategic plans.

"We are trying to be in sync with the locals. We have in our strategic priorities to always engage the community."

"We make digital videos that explain why we're doing things, and what we're doing."

"Our survey revealed that people wanted more online services."

"In our strategic plan we want to improve external communication."

"We're in the process of implementing 511 – interactive map where members of the county can post things live and geotagged."

"We are developing a communications strategy that will better use Twitter, Facebook, and Instagram."

■ STRATEGYCORN'S PERSPECTIVE:

As we continue to be bombarded by exponential changes in social media, the comments from the CAOs this year indicate that there seems to be more comfort and ease in using and managing various social media platforms. From the counties to the smaller northern communities, there is an indication that capacity is being built in the public service to use social media tools in engaging citizens, and in developing effective communication plans.

Most CAOs mentioned that they are pursuing more online engagement with their citizens. At the same time, some CAOs emphasized the importance of face-to-face meetings in engaging the public. The main challenge then is the importance of combining digital and traditional engagement techniques in reaching citizens and broadening the reach in the communities.

In this regard, the development of strategic communication plans which are supported and approved by Council are vital to direct the work of the public service.



Question 8

Council-Staff Relations

■ WHAT WE HEARD...

The local flavour of council-staff relations

As in past surveys, we found a wide range of descriptions of how CAOs describe their staff council relations, and how they are evolving.

"With elections, there has been some turnover. [...] They bring a different perspective."

"An evolving issue is that we have a council that wants more data that has been presented to them. [Staff] have a lot of data but it is not very easy to analyze. This has been a challenge."

"There has been a willingness to delegate a lot of authority to [CAO] and senior staff."

"Council does not listen to staff or their advice."

"There is alignment between staff and council on what the province is doing. The provincial side of things is bringing us together."

"We are in a state of shared optimism."

"There is an understanding that we will hold each other accountable."

Strategies for managing the relationship with Council

Participants identified many different strategies for building and maintaining trust with council.

Building Mutual Respect around Roles:

"It's really about mutual respect and a shared sense of responsibility to the residents. [CAO's] are really are trying to help council make good decisions."

"Knowing our roles and respecting our roles."

Building personal relationships

"Relationship-building and spending a lot of time with each member of Council – even speaking small-talk to them."

"Creating opportunities for departments to meet council face-to-face. This increased trust between staff and council."

"Truth to Power," professionally and politely

"Like any other council, [Councillors] want to change the world. It can be difficult to change their expectations."

"Pushing back when necessary in a professional way. And not doing it publicly."

"Sharing my opinions and asking that [Council] doesn't get offended. I don't get offended if they don't share my opinions."

Being as transparent as possible

"Trying to be as transparent as possible with our elected officials and providing more detail in community reports."

"Communication is key for things to move forward in an appropriate way."

"We try to say on top of relationships to avoid tensions."

Policy/bylaw for Council-Staff relations

Almost all respondents said that the introduction of the policy and code of conduct served more as a reference than an enforcement tool.

"The policy had a positive impact. In our municipality, it is not used as a tool, it is more on the human resources side."

"Having a policy and a code of conduct are good things. [Staff] haven't resorted to them yet, but it is nice to have."

"The new policy is useful; it sets the tone."

"The policy hasn't made a difference. The level of respect has always been there, regardless of the policy. It hasn't had an impact on our relationship with Councillors."

"We never had any issue, but the policy is there to safeguard."

"We have always had a policy working, so it is not something that has made a huge difference."

"Council has an integrity commissioner. The policy is an ornament so far."

"It's a good policy, but it comes down to the people."

■ STRATEGYCOPR'S PERSPECTIVE:

As in previous Reports, this year's participants describe a role of the CAO that is founded on credibility and trust.

With the ever-changing political landscape, the CAO must be perceptive, resilient and flexible to adapt to the demands on his/her office and possess the political acuity to respond in a professional manner, conducting business in a very high-profile environment.

Elected officials and staff work in a fragile space. Respect is the foundation for successful achievement of desired objectives.

Public expectations and acceptable practices have dramatically changed in the last decade. Both council and staff members must be aware of local expectations and acceptable practices in order to achieve satisfactory outcomes.

Political acuity and role recognition by both parties help ensure avoidance of unnecessary conflict and result in positive outcomes serving the best interests of the community.

Municipal Act changes in Bill 68 (2017) accentuated the importance of establishing "rules of engagement" between Council (policy setters) and staff (experts hired to advise on and implement policy decisions). Too often, the lines between these distinct roles become blurred.

Sensitivity and acuity are essential attributes necessary to achieve success and positive outcomes.

A policy framework to outline what acuity means in the municipal sector provides a roadmap for methodologies to raise awareness, educate and train municipal staff and elected officials to advance towards an enhanced understanding of each other's role, resulting in a more highly effective local government.

Another interesting observation of this year's Report is that, compared to previous years, we observed significantly fewer cases of tension between Councils and Staff. This observation held true for almost all upper tier municipal. This can be attributed either to the provincial policy uncertainty that has created more collaborative Council-Staff Relations , or to the correlation that upper tier municipalities Councils tend to reach consensus within them and with staff more often than not.



Question 9

Human Resources Challenges

WHAT WE HEARD...

Retirement, recruitment, and succession planning

In rural and northern municipalities, there is competition with mining or other resource industry major local employers in the private sector.

"Recruitment, retirement, those are probably the big two. Having an impact on staff morale. There are issues with how staff are taking it, people are concerned about the future of their employment, especially because of reviews. Uncertainty is an issue."

"When people come to the county, they're looking into a career. As a county we have compressed work weeks that allows people to work a little longer some weeks and then they can take off a Monday or a Friday every few weeks."

"Getting people new people is always hit or miss; from our professional side we need to develop and retain from within."

"We're trying to work through some succession planning. When we did our last strategic plan, staff and staff development was the first priority. Something like 50% of our senior team could leave within the next 5 years. It's significant issue."

Millennials

Millennials have entered the municipal work force. CAOs are facing characteristics that are unique this new generation of public servants. Some are happy with them:

"We certainly have a lot more millennials. It's the biggest thing that happened. We hired some great young stuff that are innovative and super hardworking and happy to contribute where they are needed and have really good ideas and have fun and we have bene very fortunate."

"Millennials are different from the "baby boomers", but they are doing ok. They seem engaged and we are doing a decent job with that. I don't think they are willing

to work 80 hours a week, they expect a little more autonomy. The boomers were ok with doing time and understanding that your time will come. They are not going to wait. They will walk if not given the opportunity."

While other CAOs are concerned with their career values:

"For millennials: they are in a rush and think they can be CAO in a couple years of work. We need to teach our staff and help them grow. We try to include them in policy development discussions."

"They are a different group. They are not concerned about careers and pensions."

"They have commitment issues with an employer and want to see their careers move very quickly."

"I worry about the young people millennials coming and don't look for careers anymore and for one employer. It makes it hard for us to recruit them and to develop them. I know young people that left the city not because there's greener pastures, but just because they wanted to move on."

Some CAOs are struggling with finding ways to adapt to what would attract millennial talent:

"Millennials want more flexibility, more vacations (paid or unpaid they just want more), mobile phone use, they have a more laissez fair attitude, an expectation that they'll get on the top of the salary pyramid quicker. We don't have a lot of flexibility with our compensation because we have a strict grid to protect pay equity. We have an intern that we're trying to keep excited about the municipality's work and its impact to the residents. As a sector we really need to look into the sector and look at the new dynamics."

"We are trying to provide flexibility around work. They work to support what they really want to do as opposed to really want to work. If we reduce the amount of

availability required, we weren't getting surprises such as sick calls and all that. We try to provide some flexibility. It is about the why of work. We involve them more in decision-making. They want to be involved in development of policy and they want to know why and how to make things better."

Specialist skilled workforce

The vast majority of respondents outside the GTHA expressed serious concern about recruiting specialists for both key administrative functions and frontline services.

"The relationship is still the same."

"I wouldn't characterize it bad. It is a good, professional relationship we maintain."

Some say that overall it, is different than before, appreciated it. Others saw it as almost insulting.

"We have fairly significant turnover due to retirement. There is just a lot of people leaving. We are seeing some difficulty in recruiting senior people."

"Our healthcare sector is short-staffed of nurses and so is the childcare sector."

"Difficult to find good planners and finance people."

"If there's one program that's a challenge for HR, is the long-term care industry. I think this is true across the province. And same thing for PSW and registered nurses."

"Recruitment is a big deal. We struggle with recruiting engineers or public works managers or directors. We get application that are good on paper, but they are just not the right fit for the organization. It is the skill required, especially with technology. If you are looking for someone with 15 years' experience, they may not be skilled in certain areas. The whole recruitment is the big area for us. This is a big HR challenge. The other thing is the level of conflict which increased with staff. You have multi-generations in the workforce and so you are always working with them and there is change happening."

"For instance, our paramedic services we have people from young graduates to people who are about to retire. We have had a couple dismissals because of changes that have been proposed. You have younger generation using social media to talk against employers and this has been a problem."

"We have an ongoing recruitment problem for PSW's and long-term care. Finding people with the appropriate skill set that want to come and live in rural areas. We can't compete in some areas where we require certain skillset against the private sector. It is not attractive."

"We are redesigning building to be more attractive for millennials to be in that workplace. We are creating collaborative workspaces where there is synergy and attractive to that generation. Our elected officials bought into this and we are in the process of getting this plan done now. I have been asked by a number of newer staff to look at vacation policy."

"Long-term care. It is difficult to get health care workers. Finding enough employees who want to work is a huge issue."

Impediments in attracting or holding on talent

Attracting, developing and retaining talent is of critical importance to every municipality, particularly as we experience the boomers retiring in record numbers. Succession plans need to be developed to assist in the successful recruitment process, be it internal or external.

Northern CAOs report recruiting challenges:

"Starting to see it happen that northern communities cannot attract talent; especially with shortages."

"Disrespectful comments by council damage recruitment opportunities ... lose talent."

"Recruitment is the biggest challenge. Trying to recruit people with young

families. People come here and they figure property taxes are so high. There is no transportation, so I have to have a second car."

"[Uncertainty about the regional review] is reputational damage for the sector's recruiting. We are waiting to know the provincial government's direction before we go forward with recruitment."

Initiatives to make workplace more attractive to talent

Introducing innovative methods, practices and technology to support talent attraction in the recruitment process that appeals to millennials and others will make for a solid investment.

Some CAOs are adopting more flexible approaches:

"We're trying to offer alternative work arrangements. We have a membership and local work-sharing location. Allow people to work offsite as he's getting ready for accreditation. Somebody that's 27 has a very different expectation of work compared to people close to retirement. That works well for finding staff and management, but it doesn't work well for paramedics that work 365."

■ STRATEGYCORP'S PERSPECTIVE:

Managing human resources, which often represents a significant percentage of the operating budget, can be a challenge for organizations particularly, when the HR department is lacking capacity. They may be limited to one or two HR staff, or this responsibility may belong to the CAO. Regardless, understanding the operational impacts and addressing them in a timely manner is critical to smooth and effective operations among all municipal departments.

It's important to recognize and acknowledge current HR issues so that policies and procedures can be amended or introduced to ensure they are being addressed consistently within the organization.

Among the areas of focus for effective human resource management are:

- Compliance with legislation & regulations
- Management changes
- Adapting to innovation & technology
- Compensation
- Understanding benefits plan
- Leadership development
- Succession planning
- Training & development
- Recruitment & retaining employees
- Workplace diversity

Understanding the complexities of these issues will assist organizations to attract, retain and develop effective, high performance staff members.

Very soon, millennials will be the dominant generation in the workplace. Research analysis of Census data tells us that millennials will makeup over 75% of the workforce by 2025. In fact, more than a third of today's workforce is made up of millennials and 58% of these millennials plan to change jobs for more learning and career development opportunities.

Their learning and training style drastically differ from their predecessors, so it's important to understand how they think, work and feel to better engage and motivate them. Learning opportunities and professional development are important fundamentals of employee engagement, particularly with millennials and will have to be modified to this demographic group.



Question 10

**What are the Top Three Things Keeping
CAOs Up At Night**



WHAT WE HEARD...

Overload and the “House of Cards”

As one CAO put it,

“The biggest thing keeping me up is staying one step ahead of the whole ‘House of Cards’ falling down. In the face of all this change, how do you keep up staffing and recruitment, balance the budget, improve services, and maintain infrastructure. It’s all interrelated.”

“It’s difficult to navigate how to be progressive, but there are too many balls up in the air. Things like budget pressures, regional changes, meeting community expectations – these are all things that conflict with doing exciting, new innovative things.”

Fiscal sustainability

The concern boils down to uncertainty around funding and policy changes.

“All my concerns are connected to funding.”

“This idea of not knowing what is happening with provincial legislation. Most of our programs are linked to provincial budgeting and legislation. Not knowing what is happening brings an uncertainty.”

“How far are they going to go with their cuts?”

“There will be change, but what will it look like? We are already seeing decrease in funding.”

Many concede that there is a serious fiscal challenge which Ontario is trying to address.

“Don’t pin it on Ford... they inherited the mess.”

“If you blame it on them, they see us as whiney babies.”

For those directly involved, the Review of Regional Governance looms large.

“I’m really anxious to see what’s coming out of the review that Michael and Ken are doing.”

“Regional Review is at the top of mind. I could sleep if I knew what the province’s ultimate goal for [my community] was.”

Disruption of plans

The problems relate not merely to paying for programming, but also to implementing established plans. Many respondents feel that their on-going work and plans are being disrupted.

“It is getting harder to get stuff done. All the uncertainty is one thing, but it creates concern about having the resources and capacity to accomplish things [that were part of our plan before all this started].”

“[We have to deal with all this uncertainty.] Simultaneously, we need to meet the needs of the community and make a difference be today we are never sure what is going on [with the province and how it affects our budget and ability to deliver].”

“We need to be moving forward and making sure people have a good place to live. Doing it in this environment is a challenge.”

“Attending to our growth and projects while maintaining our fiscal sustainability, while all this uncertainty surrounds us...”

Service sustainability

“The urban rural divide is getting worse. When services consolidate, it usually means less service for rural areas, especially in mental health and addictions and supportive housing. We are looking at moving into that space to fill the gaps, but it will be expensive.”

Many recognize that whatever happens, it will take time to work through the change.

“The whole changes that the province is contemplating. This will be a challenge to

adapt to whatever comes down from the province.”

CAOs all understand that Ontario has significant authority to set the agenda. Some are just trying to work with it as best as they can.

Uncertainty

The stress is taking its toll on CAOs and their management teams.

“Mandated services match our resources. That goes for both budget and staffing. That keeps me up at night, because there may be some cutting. A balance must be achieved.”

“I want to spend my time being creative and innovative. Hard to do that when you’re just trying to survive with unknowns coming at you.”

“How do you [help your team to] maintain focus in a time of fear of the unknown? When they don’t know if their jobs will even exist?”

“Right now, a lot [of what keeps me up at night] relates to what’s happening at provincial government. If there is change, tell me what it looks like, and let’s get on with it.”

Many express frustrations that the relationship is not working, either because of the pace of change, or because of unilateral provincial action.

“Too many of them [Ontario officials] have no idea what is going on in municipalities.”

“They have proven by their actions that they are not a considerate partner [to the municipal sector].”

“The government seems to have an agenda and certain targets, but it is not communicated. They consult, but the sense is regardless of consultations, there seems to always be a pre-defined outcome.”

“I will say quite honestly, for the last two months, I was spending all of my time reading legislation and staying on top of

provincial legislation and knowing what is going on.”

For some, there is a sense that it is an adversarial relationship.

“Where will we get hit next and how do we respond?”

“When they pulled back budget changes there was backlash. It gave us courage that there was opportunity to impact some of the outcomes.”

“The governance, we really need to answer it once and for all and move on.”

Human resources

“The mood of uncertainty is making our HR problems worse. Are we having service cut discussions, are we going to have to lay off staff?”

“What we are hearing from Ontario does not bode well.”

Recruitment is an issue.

Long anticipated challenges in the pool of experienced staff are coming home to roost and being exacerbated by the climate of uncertainty. CAOs identified that there were not enough candidates, and where good candidates did exist, there was competitive pressure from other “within a drive” public sector employers, and from the private sector. These challenges are exacerbated in northern communities.

“I put a lot of value in getting good people and putting them in the right position. I’m involved in all the recruiting areas. Every time it seems that the pool just keeps getting shallower for skilled work talent.”

“The workforce issue is huge, there is no department that doesn’t suffer from recruitment problems.”

Retention and retirement are a problem.

“[There is] worry across organization on what future will look like, [with all the] unknowns of provincial announcements and what are we doing to address them. Good people are leaving because of it.”

"Because of the times, the uncertainty, they are saying 'that's it, I'm retiring, I don't need this anymore.' Who can blame them? Who would put up with this?"

"There is a loss of expertise that people have built up over many years."

"We have knowledge in peoples' minds [that we are going to lose to] retirement. I worry about the continuity and the impact on this."

Inter-municipal collaboration

As scarcity grows, some upper tier CAOs are experiencing a decline in relations among their municipal members.

"When you get into a time where resources are scarce, there is a loss of community. People become competitive and angry and the communities don't work together anymore."

Regional variation

Depending on the place, specific pinch points of concern vary.

"Housing affordability: [The Private Sector] is not building the type of housing we need. There is lots of construction, but not for the demographic that needs affordable housing. Employers are telling us they can't hire people because of housing prices."

"Infrastructure problems in the community. This could be a real nightmare in the upcoming years."

"My director of public works said it's like spinning of the plates and eventually they are going to break."

"Paramedic services and long-term care facilities are in so much flux and they keep us up at night how we will find resources."

"Long term care, it is going to be expensive. We are going to go into debt and it is a big expense. We are trying to find partners as well. A lot of the neighbouring municipalities are going through that route as well."

"The Ontario Health Teams and how they will affect our assets and operating funding is keeping me up at night. The governance and financial accountability does not seem to have been thought through, how municipal culture can fit with health culture in these new Ontario Health Teams."

Other Issues

Climate change and environment

"Our ability to address the infrastructure needs for this is a major thing keeping me up."

Indigenous relations

"There are a lot of First Nations communities in the area, a lot of trauma from residential school and it is impacting community. We are work together for economic development."

"There is a large indigenous population. There are many related social issues [which require service,] but in addition, [our community has concerns about] racism, and managing that [is a significant challenge]."

Technology

"Cyber attacks worry me, but also the impact that technology has on people, such as social media. Also, the disruptive part, such as the potential of AI to impact staffing in transportation, finance and social services for example."

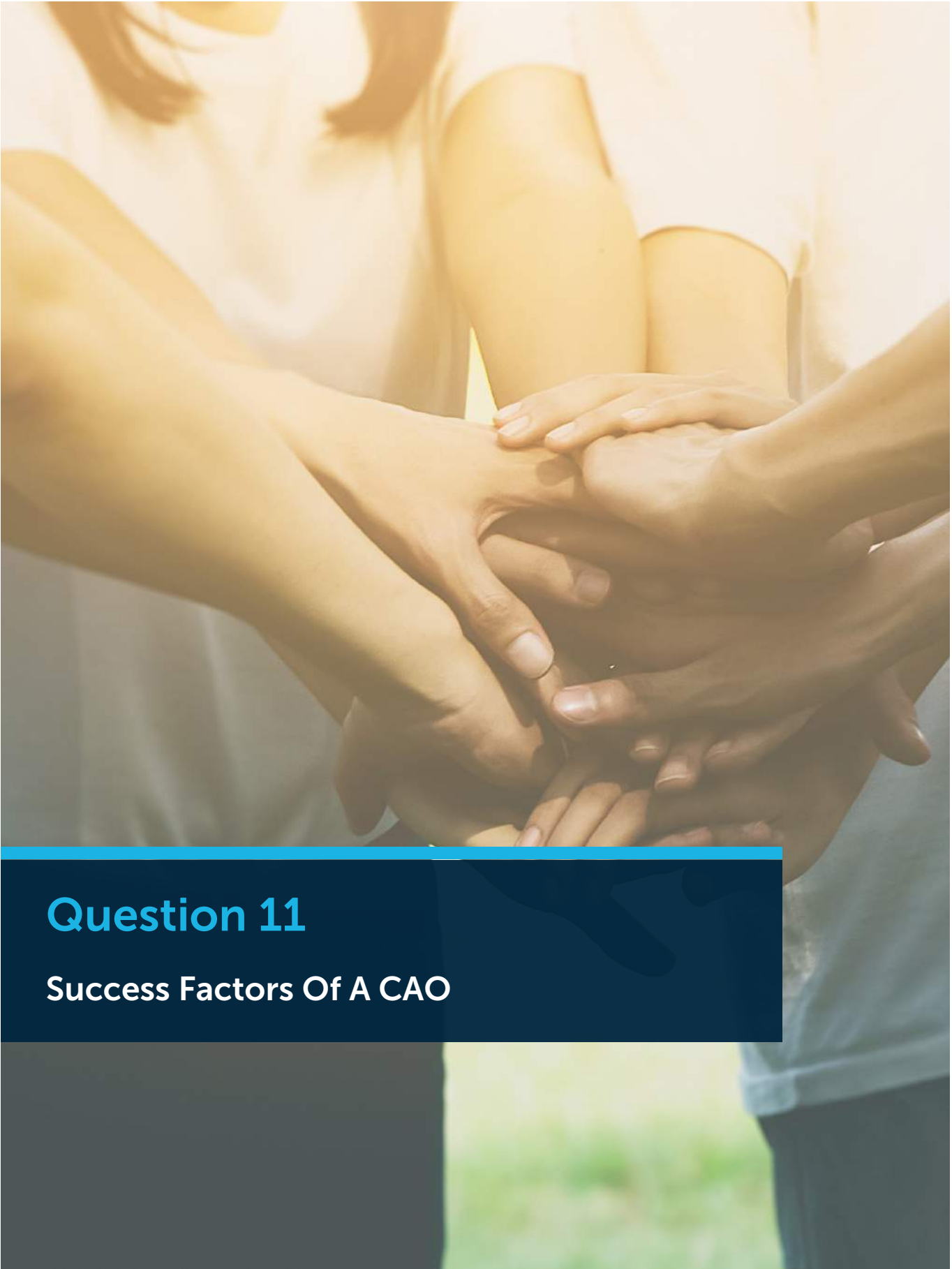
Housing/Growth

"We have huge housing dilemma. We have different demands from citizens. A lot of the people who grew up here and work here can't afford to live here. Government can't be mother and father of everyone, but we must do something to address that."

STRATEGYCORP'S PERSPECTIVE:

"What are the top three things keeping you up at night?"

<p>All participants</p>	<p>Fiscal Sustainability</p> <ul style="list-style-type: none"> • Provincial cuts and downloads <ul style="list-style-type: none"> • Maintaining services and Infrastructure • Pursuing our own approved priorities • Finding Efficiencies • Managing a growing urban rural divide
<p>More than three quarters of participants</p>	<p>Uncertainty and potential change in governance arising from the Regional Review</p>
<p>Half of participants</p>	<p>Human Resources</p> <ul style="list-style-type: none"> • Retention • Recruitment • PTSD
<p>Other Mention : Less than a quarter of participants</p>	<ul style="list-style-type: none"> • Health and Safety • Environment/Climate Change • Technology innovation and cyber security • Housing • Indigenous relations



Question 11

Success Factors Of A CAO

■ WHAT WE HEARD...

Relationship with council and political acuity

"Having meaningful relationships with council."

"...Building a level of trust with council. Even when on opposite sides, I make sure they see how I am laying out the facts. Ensuring it is issue-based, as opposed to personality."

"Managing [Council's] expectations."

"Showing [Council] strength and they can rely on you to be that stable and consistent person."

Relationship with staff and investing in staff

"Improving conduct and managing expectations."

"Making the policy and business work."

"Identifying the strength of those around you."

"Ensuring there is a role of engagement and our staff know that they play an important role."

CAOs values

"Always improving our team - the product and the people."

"The CAO is the conduit between governance and employees - having that sensibility around making the politics work and the business work."

"Resilience. You got to know that some days, it's not your day."

"Giving back to the community and those that are here."

"Coming up with good ideas and being a risk-taker."

"Having a bigger vision, good relationship management skills, and being forward-looking."

Other

"Diversity, inclusion and the continuous evolution of the organization."

"Ensuring the message is clear from staff to council, the reverse and the communication from City to community as a whole."

"Your people skills are what is most important to your success. If you have good people skills, then this is set for success."

"[CAOs] are the face of municipality. Getting along with people and getting their respect is very important."

"Community partnerships and community-building."

"Bringing innovative processes."

■ STRATEGYCORN'S PERSPECTIVE:

Municipal CAOs are managing on many levels, especially currently.

- In this time of uncertainty, they understand that they are the rock in the storm. They know that many are looking to them for a sense of stability.
- They are also ensuring that it is business as usual on the home front, that services continue to be delivered and that continuous improvement is a mainstay of the civic service.
- They know that the same level of thinking will not address the challenges facing the municipality and are looking to innovative ways to meet these challenges.

CAOs know that they are that point between Council and staff where they need to manage expectations and represent one party to the other at different times. Managing these relationships will be key to the success of the municipality.

They rely on their values to sustain them in a difficult and at times lonely role. It is their values that provide them with success in the long term—always has and always will.

They are undaunted and prepared to address the challenges coming their way.

They are the proverbial duck—calmly swimming on the surface and paddling like hell underneath!

COUNCIL RELATIONS

PEOPLE **COMMUNICATION** CHARACTER
STRATEGY SERVICE **LEARNING** TRUTH
ETHICS **ORGANIZATION** RESPECT
ADVERSITY **TEAMWORK** PURPOSE
EQUALITY FAIRNESS **LEADERSHIP**
HONESTY **ACCOUNTABILITY**

INNOVATION

CREDIBILITY

Question 12

Management Axioms

We asked CAOs if they had any management axioms that they relied on, or they had reflected on during their career.

■ WHAT WE HEARD...

Personal traits

"Show up on time and get your homework done."

"Communication is key. Never hesitate to pick up the phone to ask a question."

"You need to be humble in the role to do it well."

"Seek as many perspectives as you can. I have yet to be criticized for over-communicating on any issue."

"My 6 values are: Respect, honesty, wellness - for yourself and for the organization - accountability and innovation, and continuous learning."

"Don't be afraid to fail."

"Help is not on the way, Solutions have to come from within."

Credibility /forthrightness

"My mantra is to communicate and to be transparent about everything. Honesty is the best policy Maintain your credibility at all cost."

"You have to tell it the way it is. I don't see any sense in sugar coating things."

"Always tell the truth. No letting down people easily."

"Show, don't tell: Councillors don't care how many degrees you have, if you show them how you can deliver results, they will grow in respect to you."

Orientation to others

"Take the high road and be professional at all costs."

"Treat everyone with respect."

"It doesn't cost you anything to be nice."

"Everyone is overloaded and trying to do the best job they can."

Relations with Council

"Elected officials are the boss."

"Fair doesn't mean equal. Except for council, when equal does mean equal. And equal also means fair. I also say treat them all the same."

"It is for staff to dig in and do better and council to come up with a decision."

Purpose

"You have to keep focused on what's important."

"Never forget to stand still, or you'll fall behind."

"Keeping a focus on why we are here, deliver the best services to our citizens."

Leadership

"Lead from the front."

"Lead by example."

"Be firm, fair and friendly in everything that you do."

"Surround yourself by people who are way smarter than you are. If there aren't then you are not doing it right."

"Connect with people, they all have lives too. Communicate things in ways that are understanding."

"Manage the relationships, build a team, lead with a vision."

"Who are you being when you're doing what you're doing? If you are a supervisor, are you being true to yourself and true to character?"

"Remember who you are when you are doing what you are doing. Always retreat to who you are as a person."

Public Service

"The desire to improve your community is one of the things that attract to work in public service. You do not survive in a long career if you don't have these intentions."

The CAO role and success

"You don't survive with ethics alone... ethics is what you do when people are not looking. You survive with relationships and how you interact with people."

"You have to be a person before you are the CAO or whatever your job is."

"Making sure that I do have time for my family as well."

"Remember that there is a life outside of here, remember to make time for family."

Teamwork

"Getting a solid team and then trusting them to be great. I don't micromanage."

"Can never deal with everything on my own, hire and promote the right way, and make sure you have the right people in the right positions."

"You have to treat your people as your best resource. I wouldn't be here without a lot of smart people."

"Have a strong HR department."

Adversity

"When I first started, I had a boss that said his mantra is "no surprises". I have determined that this is an unreasonable request. As a CAO expect surprises, have a game plan for when there is a surprise."

"A journey of a thousand miles begins with one step, so I shouldn't get overwhelmed."



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