

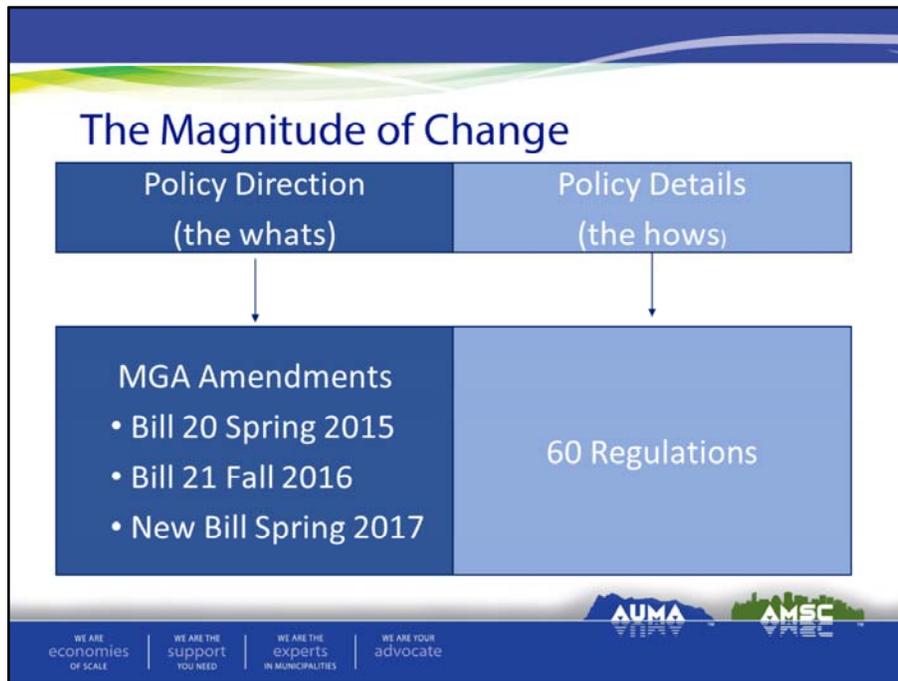
MGA Change Management

March 2017 Mayors' Caucus

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The banner features a top section with green and yellow wavy patterns. Below this is a dark blue horizontal band containing the title 'MGA Change Management' in white. Underneath the band is the subtitle 'March 2017 Mayors' Caucus' in blue. At the bottom, there is a dark blue footer containing four columns of text and two logos: AUMA and AMSC.



- Over the past few years, AUMA has been working closely with you to identify the required changes that we need to make to the MGA.
- As a result of our work, two Bills have been passed by the province to make some long overdue modernization.
- A third Bill is under development and will be released this spring.
- It's time to turn our attention to how the changes will be implemented.
- When you think about all the changes that are coming, it can be a rather staggering amount of work.
- AUMA wants to assure you that we are here to help you respond to these changes.
- We have had very collaborative discussions with the AAMDC Board and both Boards agree that we need to work together to provide you with tools and resources so that you don't individually have to do the same work effort.
- We also want to save you from being burdened by the hiring of expensive consultants who are looking at the MGA as an opportunity to generate a lot of business.
- We know that many consultants are already knocking on your doors with offers of help.
- While consultants can play a valuable role for specific initiatives in your community, you shouldn't have to hire them for services that AUMA and AAMDC can provide as part of your membership fees.

**Bill 20 Amendments**

- City charters enabled
- **Council codes of conduct**
- Voluntary amalgamations
- Annexation principles and procedures
- 3 year operating and 5 year capital plans
- Public participation policies
- Hierarchy of statutory plans
- Subdivision and appeals board training

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- As you see on this slide, the 2015 Bill contained a number of amendments.
- One of the items where we expect to provide support is the mandatory code of conduct which I'll describe in a few minutes.

**Bill 21 Amendments**

- Mandatory **Intermunicipal Collaboration Frameworks**
  - Mandatory Intermunicipal Development Plans
- Mandatory **Municipal Development Plans**
- Mandatory **Elected Official Training**
- Four new types of Offsite Levies
- Growth Management Boards
- Oversight by the Alberta Ombudsman
- Property Assessment and Taxation Reforms

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- The fall 2016 Bill has even greater impacts as it includes mandatory intermunicipal collaboration frameworks, which must be developed within 2 years, with another year allowed for any required mediation and dispute resolution.
- Intermunicipal development plans are a required component of these frameworks.
- Another change is the requirement for mandatory municipal development plans, which must be completed within 3 years and be included in the ICF agreement.
- As well, there is a requirement for mandatory training of elected officials within 90 days of their taking office.
- The bill included four new types of offsite levies, including for fire halls, police stations, libraries and recreational centres.

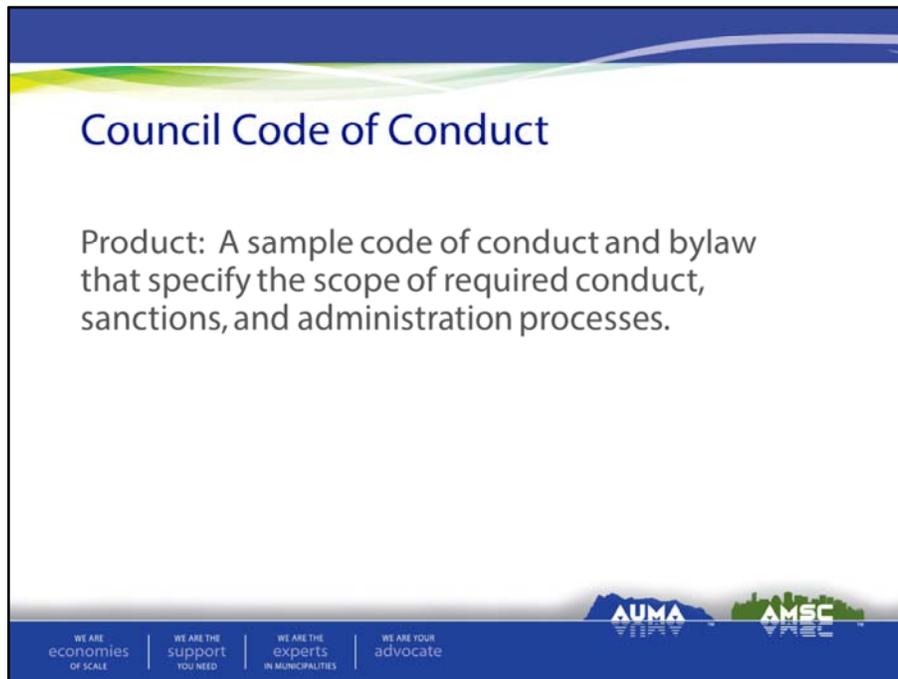
## AUMA, AAMDC and Municipal Affairs are Providing Supports



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- AUMA and AAMDC are discussing these requirements with Municipal Affairs and we have a plan for how we can work together to develop required supports.
- Today's session provides an opportunity to share our intentions and receive your input so that the change management tools are timely and helpful.



- One of the key changes is the need for a council code of conduct
- AUMA provided input in 2015 and 2016 on the regulations that will be developed for the code of conduct.
- We specified what the scope should include, the sanctions that should be available, and how it should be administered.
- We understand that the province is considering our submission but we will not know the outcomes until they share the regulation is published later this spring.
- We expect that Councils will have 270 days to get a code in place and that it must be reviewed every three years.
- Once we are clear on what is set out in the regulation, AUMA and AAMDC will work together to develop a sample code of conduct and bylaw template that you can use as a starting point for your municipality.
- We expect you will want to tailor it to your needs but we hope that by providing you with these templates that we will save you a lot of time and effort.
- That way, you can focus on other required changes such as the 3 year operating and 5 year capital budgets.

## Mandatory Elected Officials Training

AUMA's Submission

- Should be mandatory to complete training in 90 days
- Elected officials should be subject to disqualification from office if training not taken.
- Disqualification should be within the scope of potential sanctions for a breach in a municipal code of conduct.

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- Another requirement is the mandatory training for elected officials which will be required within 90 days of being elected.
- This was a policy change that AUMA supported, as we had brought forward three main requests regarding training:
  1. Municipal candidates should be required to complete a basic orientation and agree to comply with the municipality's code of conduct for council before their nomination papers are accepted.
  2. A municipal elected official who does not take the required training within 90 days of being elected should be disqualified from office. Exceptions authorized by the Minister should only be made in extenuating circumstances such as a documented serious illness.
  3. Disqualification from office should also be within the scope of potential sanctions for a breach in a municipal code of conduct.
- The way that the legislation is written still just requires a municipality to OFFER the training, but we understand that there may be more guidance provided in the code of conduct regulation that is to be released in April.

## Leveraging the Elected Officials Education Program

- Timely
- Accessible (convenient and low cost)
- Relevant (Consistent Base and Tailored for Regional/Local Matters)
- Relationship Building

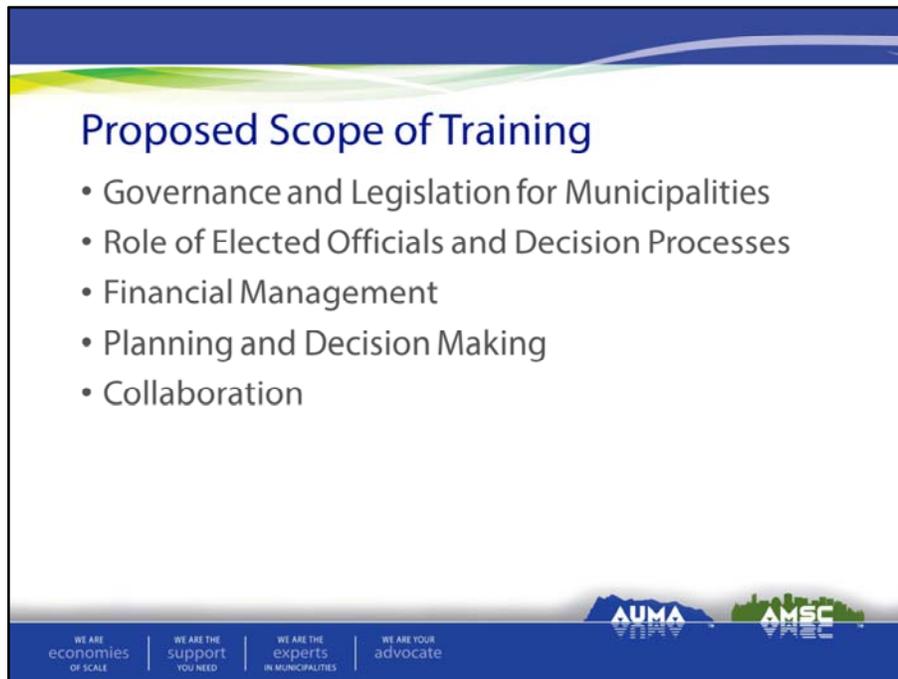


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- AUMA and AAMDC have met with Municipal Affairs and agreed that we should leverage our existing Elected Officials Education Program as a mechanism to provide this training.
- Municipal Affairs has invested over \$1 million in this training program so they are keen to see it used.
- We expect that the kind of training we provide for the mandatory elected officials training will be quite different from the way that we normally do training.
- For example, we could have between 2000-3000 elected officials all needing to take this training in the same short period of time so we know it's won't be in the usual style of 20-25 people per session.
- Here are the goals that we have for the mandatory elected official training.
- First, we want it to be timely.
  - So we'll be seeking your input on whether you need it to be available immediately after taking office as we know you can't suspend council business for 90 days while this training is unfolding.
  - Another part of being timely is that it is an efficient use of your time. Time is a very precious thing - many elected officials have full time day jobs that are unrelated to their council work.
- Second, we want it to be accessible.
  - So we are planning to offer it in multiple places across the province.
  - By having it in various regions, we can reduce your travel costs.
  - We also want to keep the registration fee itself very low.
- Third, we need to make the content relevant so you have a quality learning experience.
  - This means having some kind of core content that is the same no matter where you take the training but also allowing for dialogue about specific local or regional matters.
- And lastly, knowing that there could be a number of new faces around Council tables, we want this to be an opportunity to develop collaborative relationships – both within your Council and with other Councils in your area.
- Bottom line – we want to reduce the burden of this requirement and turn it into a positive and productive experience for both the elected officials and for the CAOs that would otherwise have to carry out this training.





- Here is what are proposing to include in the scope of training so that it is fully compliant with the legislated requirements and expands on other topics that are important to your work.
- There are five components or modules.
- The first module will be about understanding the basics of municipal governance and legislation, which will include the types of municipalities, their core responsibilities and functions and the legislation that they must follow such as the MGA, land use planning framework and others.
- The second module will include the elected official's role in municipal leadership, which will include how councils function, roles and responsibilities of CAO and staff, and how decisions are made.
- The third module will include municipal finance, including how municipalities are funded and their requirements and processes associated with budgeting and financial administration, asset management and others.
- The fourth module covers land use planning.
- And the last one is on collaboration and includes legislative requirements for collaboration (for example, intermunicipal collaboration frameworks and intermunicipal development plans) and opportunities and challenges in collaborating with neighbouring municipalities.

**Delivery of Training**

- 1 ½ - 2 days
- In-person training soon after election
- Regional approach
- Local discussions
- Standard content (workbook and vignettes)
- Education + Networking Relationships

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- We expect this course will need to be about 1 ½ to 2 days so that there is enough time to have discussions and a more interactive learning environment, rather than just someone speaking “at you”, as would occur in a shorter format.
- The training would be done in-person but we expect to have some video clips featuring some guest speakers as that avoids the logistical and cost challenges of getting speakers out to each individual session.
- As I mentioned, we envision a regional approach where there would be standard content but with discussions about top of mind local and regional matters.
- There could be a couple hundred people at each session.
- We see this as not only an opportunity to learn more about your role as an elected official but also as an enjoyable time to network and build relationships with those that you will be working with over the next four years.
- Note that these courses will be very much focussed on “WHAT” elected officials need to do.
- We will work with Municipal Affairs to ensure that this training fully complies with the mandatory training requirements.
- We will also work with CAOs to ensure it is complimentary to what they may offer locally.
- Note that elected officials may wish to take later courses through the Elected Officials Education Program on the “HOW TO’s” – we will have detailed courses available in the

regular small group learning sessions that may be taken at any time.

## Other MGA Tools and Templates

- ICF Templates and Workbook
- Offsite Levy Templates and Guidance
- Public Participation Policy Template
- Inclusionary Housing Guidance



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- Here are some other resources that we intend to work on with AAMDC and Municipal Affairs.
- We expect that there will be a toolkit to help with intermunicipal collaborative frameworks that will include templates for single relationship and multiple municipality ICFs, and a guide to help out in developing them.
- Municipal Affairs is currently funding a project whereby Whitecourt and Woodlands County are preparing an ICF that could be used as a sample for others.
- As well, we know that it would be helpful to have an Offsite Levy template to provide guidance with the new types of offsite levies for libraries, police stations, fire stations and rec centres.
- We will also work on a Public Participation Policy template and toolkit to get you started on your own public participation policy, which you will need to develop and make available to the public.
- And we expect to develop a toolkit that provides guidance on how to utilize the new inclusionary housing provisions, which will increase your options in developing affordable housing within your municipality.

## Table Discussions

### Elected Officials Training Model

- Duration: approximately 2 days?
- Timing: how soon is this required after election?
- Content: how it aligns with local council training?
- Regional approach: which locations work best?
- Other feedback?

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- Now it's time to hear from you.
- First, we'd like to hear your thoughts about our proposed approach for the elected officials training.
- Specifically, we are seeking your input on the proposed duration of approximately 2 days.
- Also when you want this training to be available – do you need it shortly after election – for example the first two weeks - or could it be completed later?
- Also, your thoughts on our proposed training and how it will align with what your local training – CAOs – we'll need your thoughts for sure on this one.
- We're seeking ideas on regional locations that would work well – places that have a facility that we can use.
- And lastly, any other feedback you may have.

## Table Discussions

- How valuable will these tools be?
- Are there any other tools or templates you'd like AUMA to consider developing?

### MGA Change Management Tools

- ICF Templates and Workbook
- Offsite Levy Templates and Guidance
- Public Participation Policy Template
- Inclusionary Housing Guidance

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- Second, we'd also like get your feedback regarding the other MGA change management initiatives.
- We'd appreciate your thoughts on their relative value – are they really important or not so important?
- Is there anything else you would like us to consider providing?