

PADM 308 – MATI The Successful CAO: Local Government Advanced Management

February 15–20, 2018
Bowen Island Lodge, Bowen Island, BC

A partnership between Capilano University
and the Local Government Management Association of BC



MATI®



LGMA

MUNICIPAL ADMINISTRATION
TRAINING INSTITUTE



This course was
developed with
generous support
provided by:



2018 MATI – THE SUCCESSFUL CAO

Are you new to the job of CAO or thinking of taking on the challenge? Are you interested in how to plan for success and avoid some of the common pitfalls of the job? If so, then *MATI The Successful CAO* is for you!

The role of a local government CAO is becoming increasingly complex and challenging. This course, designed by a team of veteran local government CAOs and educators, was created to support you to be successful in the CAO role.

In this week long residential course you will...

- Work with a team of highly experienced CAOs;
- Build a network of senior and CAO colleagues;
- Develop a critical understanding of the role of CAO;
- Learn the first steps you can take when assuming the role of CAO and the next steps if you're already in it;
- Analyse your organization and develop a strategy to match your situation;
- Apply new knowledge and skills to ethical challenges;
- Learn to work effectively with and support your Council or Board; and
- Take home skills and knowledge you can apply on your first day back at work!



The Sessions

THURSDAY EVENING

SESSION OPENING AND KEYNOTE

Linda Adams, Course Coordinator, and former CAO, Islands Trust, **Allison Habkirk**, Planner, Educator, former Mayor and Councillor, **Ron Poole**, CAO, District of Mission and MATI Mentor, and a representative from LGMA.

MODULE 1

How Did We Get Here? The Evolution of the CAO Role

Allison Habkirk and **Ron Mattiussi**, City Manager, City of Kelowna, will trace the evolution of the CAO role from the Tamany Hall crisis and reform period of the early 20th century to the high pressure local government environment of the 21st century. They will discuss the genesis of the CAO role, the city manager model of local government, the separation of policy making and administration and emerging models for CAOs working in today's pressure filled local government world.

MODULE 2

The Joys and Common Pitfalls of the CAO Role

Ron Poole, a veteran CAO and our course Mentor, will help you appreciate the joys of being a CAO and public servant in ways you may not have considered. He will lead us through CAO success case studies and illustrate with stories from the field some of the common pitfalls and challenges of the role.

Time and Place

The 2018 session of MATI The Successful CAO will start at 4:00pm on Thursday, February 15, 2018 at Bowen Island Lodge, Bowen Island BC. The course will run until late morning on Tuesday, February 20, with participants living "in residence" at the Lodge and adjacent B and Bs.

See: www.bowenislandlodge.ca

The program timing has been set to enable CAOs to attend LGMA's CAO Forum to be held in the lower mainland February 20–22, 2018. This is an excellent opportunity for CAOs to continue their learning and networking.



2018 MATI – THE SUCCESSFUL CAO

FRIDAY MORNING

MODULE 3

Who Does What?

This session will challenge your thinking about the role of CAO and help you to shape the way you view the job. In this interactive session, **Linda Adams** and **Allison Habkirk** explore the different roles and responsibilities of the key players in the local government system including: elected officials, CAO's, staff, and the public. They examine a variety of perspectives, research and thinking about the roles and how you can best work with them.

FRIDAY AFTERNOON

MODULE 4

Assessing Your Organization's Situation

What steps should you take when you first take on the job of CAO? **Russell Dyson**, CAO, Comox Valley Regional District and **Debra Oakman**, former CAO, Comox Valley Regional District, will introduce the "STARS" model from *The First 90 Days in Government* text so you can assess your organization and develop a strategy to match your organizational circumstances. In this active learning session you will have the opportunity to apply the "STARS" model to case scenarios, and begin to think about how to analyse your own organization.

FRIDAY EVENING

One-on-One sessions with experienced CAOs

Friday evening will be an opportunity to meet one on one with a veteran local government CAO. Book an appointment and take advantage of this unique opportunity to sit down privately with an experienced CAO to discuss a problem or explore an opportunity. Our list of mentors includes: **Linda Adams**, former CAO, Islands Trust, **Jerry Berry**, Consultant and former City Manager, Nanaimo, **Ruth Malli**, former CAO, Town of Ladysmith, **Paul Murray**, Director of Financial Services, District of Central Saanich and LGMA Past President, and **Debra Oakman**, former CAO, Comox Valley Regional District.

SATURDAY MORNING

MODULE 5

Ethics and the Responsible CAO

Have you faced ethical dilemmas in your career as a public servant? Were you successful in dealing with them? This interactive session led by **Jerry Berry** and **Guillermo Ferrero**, CAO, Town of Ladysmith will help you navigate the dangerous waters of ethical challenges. It will provide you a foundation to use when faced with ethical choices, and give you context to help you understand your role and responsibilities as a "responsible public servant."

SATURDAY AFTERNOON

MODULE 6

It's All About Relationships: Leading Up, Down and Out

David Siegel's ground breaking book, *"Leaders in the Shadows,"* proposes that local government CAO's lead in three different directions: up, down and out. **Ron Poole** and **Mike Younie**, Deputy CAO, District of Mission will facilitate plenary and small group discussions of Siegel's approach. Siegel's research and writing on the topic of the role of local government CAOs is an eye opener for anyone working in local government today. Siegel analyses the challenges of the role and examines ways in which those who take on the role need to develop special skills and adaptive behaviours if they are to be successful. This session is a chance to learn about Siegel's approach so that you can build successful relationships with your elected officials, your community, and organizations outside of your local government.

SATURDAY EVENING

Allison Habkirk will facilitate this engaging session where participants will present their situational analysis of their organization. This is a great opportunity for you to benefit from your colleagues' experience and to consider and examine the steps you can take to match your strategy to your organizational situation.



2018 MATI – THE SUCCESSFUL CAO

SUNDAY MORNING

MODULE 7 *Supporting Council/Board Effectiveness*

How do CAOs support their Council or Board to be effective? Hear from former Mayor and Councillor **Allison Habkirk** and former CAO **Linda Adams** about what elected officials need to learn to be effective and from Linda Adams about her knowledge transfer approach to supporting her council. This session will include discussion of topics including: orientation best practices and on-going learning for elected officials.

MODULE 8 *Strategic Planning – Goal and Service Alignment in Your Organization*

Session leaders **Allison Habkirk** and **Guillermo Ferrero**, CAO, Town of Ladysmith, will explore the foundations of strategic planning and outline Ladysmith’s successful approach to intergrating strategic goals into local government operations.

SUNDAY AFTERNOON

MODULE 9 *Organizational Culture*

In this session **Ron Poole** and **Elsie Lemke**, CAO, District of Peachland, will lead you through a discussion of tools for sustaining a positive organizational culture.

MODULE 10 *Service Reviews*

Kevin Ramsey, Consultant and former City Manager, City of Port Moody, will provide tools for assessing your organization’s service levels, aligning goals and managing change.

SUNDAY EVENING

MODULE 11 *CAO Roundtable Discussions*

This session involves an all-star team of veteran CAOs to provide participants with an opportunity to ask questions about anything they ever wanted to know about being a CAO. The roundtable team includes: **Linda Adams**, Former CAO, Islands Trust, **Mike Furey**, CAO, Resort Municipality of Whistler, **Elsie Lemke**, CAO, District of Peachland, **Ron Mattiussi**, City Manager, City of Kelowna, **Gary Paget**, Senior Policy Advisor, MCSCD, **Kevin Ramsay**, Consultant and former City Manager, City of Port Moody, **Brian Reardon**, CAO, Regional District of Central Okanagan and **Lori Wiedeman**, CAO, Village of Queen Charlotte.

MONDAY MORNING

MODULE 12 *HR Matters: CAO Contracts and Evaluation Processes*

Creating and maintaining an open discussion with your Council or Board about performance is critical to CAO success. In this session **Elsie Lemke** and **Lori Wiedeman** will walk you through some of the key HR components critical to CAO success including CAO contracts and effective CAO evaluation tools.

MODULE 13 *Come Hell or High Water!*

What would you do if your community faced an emergency? This session will feature **Elsie Lemke**, **Ron Mattiussi** and **Brian Reardon**. Be prepared for an engaging session with three CAOs who’ve been thrust into leadership roles during fires, floods, and evacuations. Learn from their experience how you can prepare to take on the role of CAO in an emergency situation.

MONDAY AFTERNOON

MODULE 14 *Leading “Out” – Effective Relations With Other Governments, the Community and External Agencies*

Building effective relationships with the community and external organizations (leading out) is essential to CAO success. In this session **Ron Mattiussi**, and **Allison Habkirk** will explore key approaches and tools to build trust and effective working relationships that you will need over the long term to lead successfully.



TUESDAY MORNING

MODULE 15 *Bringing It All Together – Your CAO Action Plan*

Participants will report out on their Action Plans and learning goals for professional growth and success! The course will end before noon on Wednesday.

REGISTRATION

University Credit Option

As with other MATI programs offered by Capilano University and LGMA, participants are encouraged to enroll in the program as a 3-credit Capilano University course, PADM 308. When taken for credit, this course may be applied towards the Capilano University Advanced Certificate and Diploma in Local Government Administration, the Local Government Leadership Development Certificate and as credit toward the Provincial Board of Examiners' Certification.

International Institute of Municipal Clerks (IIMC)

The IIMC grants the professional designation known as Certified Municipal Clerk (CMC). To earn the CMC designation, you must have the education and pertinent experience required by the IIMC. In terms of educational requirements, each of Capilano University's Local Government Program courses (including all Capilano MATI courses) is accepted by the IIMC towards the CMC designation when taken for credit. MATIs offered through Capilano University each provide 30 points of the total required 60 IIMC points. For more details on Capilano University courses and IIMC requirements, contact Alison McNeil at Capilano University (amcneil@capilano.ca) and visit the IIMC website at www.iimc.com.

Pre-Requisites and How to Register

For new CAOs and senior management who have already taken at least one of the following courses with Capilano University: MATI Advanced Communications, MATI Managing People,

MATI Leadership or PADM 307 Ethics in Local Government. If you are a current CAO (including an Acting or Deputy CAO), but do not meet the pre-requisites, please contact **Linda Adams** at lindaadams@capilano.ca. To apply for attendance at MATI The Successful CAO, please go to the CivicInfo 'Events' website and **apply by December 16. After this date, contact Anna Delaney** at adelaney@capilano.ca to inquire about space availability.

Register at: www.civicinfo.bc.ca/events/2018/mati-cao

Fees

The fee per participant is **\$2,600 (plus \$130 GST)**. This is an all-inclusive fee, which will cover tuition, course materials, accommodation, all meals and refreshment breaks, and all special recreational activities. The \$2,730 fee can be paid on-line by credit card at the time of registration or by sending a cheque to:

Local Government Management Association of BC
Financial & Program Administration
620 View Street, 7th Floor Central Bldg.,
Victoria, BC V8W 1J6

Refund Policy

Refunds will be processed until December 2, 2017 subject to a \$50.00 LGMA administration fee. After December 2, no refunds are provided; however, registration may be transferable to another qualified candidate, if one is available.



FUNDING ASSISTANCE AND FACULTY

Board of Examiners' Credit and Scholarship

MATI CAO participants will be eligible for a scholarship from the provincial UBCM Commemorative Scholarship fund. Those interested in a scholarship may apply by submitting a scholarship application to the Board of Examiners. Application forms are available on-line from the Board of Examiners website at:

http://www.cscd.gov.bc.ca/lgd/gov_structure/board_examiners/index.htm

If you are working towards certification from the Board of Examiners, please note that MATI CAO, when taken as credit course, is accepted as an Elective for the Provincial Board of Examiners' certification. For this reason, the Board will award credit students with higher scholarships than non-credit students.

For further information on the Board of Examiners please visit the Board of Examiners' website or email:
bcboardofexaminers@gov.bc.ca



2018 MATI THE SUCCESSFUL CAO – GUEST FACULTY TEAM

Linda Adams	Course Coordinator and former CAO, Islands Trust
Jerry Berry	Consultant and former City Manager, Nanaimo
Russell Dyson	CAO, Comox Valley Regional District
Guillermo Ferrero	CAO, Town of Ladysmith
Mike Furey	CAO, Resort Municipality of Whistler
Allison Habkirk	Course Instructor, Local Government Consultant, Town Planner and Educator
Elsie Lemke	CAO, District of Peachland and Course Chair
Ruth Malli	Former CAO, Town of Ladysmith
Ron Mattiussi	City Manager, City of Kelowna
Paul Murray	Director of Financial Services, District of Central Saanich and LGMA Past President
Debra Oakman	Former CAO, Comox Valley Regional District
Gary Paget	Senior Policy Advisor, Ministry of Community, Sport and Cultural Development
Ron Poole	CAO, District of Mission, and MATI Mentor
Kevin Ramsay	Consultant and former City Manager, City of Port Moody
Brian Reardon	CAO, Regional District of Central Okanagan
Lori Wiedeman	CAO, Village of Queen Charlotte
Mike Younie	Deputy CAO, District of Mission

If you have any questions, please contact:

Linda Adams, Instructor and Course Coordinator, MATI CAO,
Capilano University
2055 Purcell Way, North Vancouver, BC, V7J 3H5
Phone: 250-882-0555
Email: lindaadams@capilano.ca
www.capilano.ca/local-govt/