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WORKABLE SOLUTIONS: A LABOUR FORCE STRATEGY FOR RURAL MUNICIPALITIES

FINAL REPORT

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FOREWORD

This document presents the results of an extensive process of research, consultation and analysis to prepare *Workable Solutions: A Labour Force Strategy for Rural Municipalities*.

The word “strategy” implies a plan of action over some period of time. The recommendations presented here span time periods ranging from the immediate to a longer term of five or more years. The intent is to offer a variety of different strategies that will address potential opportunities, threats and barriers that exist in many rural municipalities.

The focus is on rural communities, be they counties, municipal districts, towns or villages. We see no distinction among the issues faced by rural municipalities and as a consequence have addressed the preparation of solutions for a rural community audience.

Many of the solutions make reference to working cooperatively with neighbouring communities to achieve results. This spirit of working together does not jeopardize the autonomy of individual municipalities. The intent is to leverage individual strengths to address common weaknesses.

The need to work cooperatively reaches beyond the sphere of municipalities and extends to the host of associations, both professional and fraternal, that involve to some degree, rural municipalities. In particular we see a potential need to rationalize the standardization of education and training for rural municipal employees.

We extend our thanks to the many rural administrators and councillors who took the time to complete the *Workable Solutions* Surveys and to meet with us individually to share their insights into rural labour force issues and solutions.

A word of thanks also to the Steering Committee for this initiative and for their considerable time, patience and input into making this a better plan.

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EXECUTIVE SUMMARY

INTRODUCTION

Alberta's booming economy has resulted in a labour shortage that affects practically all employers in the province, including rural municipalities. Compounding the issue for some rural municipalities is the long-standing reality that relative isolation from major centres puts them at a disadvantage in attracting and retaining staff.

The Workable Solutions Labour Force Strategy for Rural Municipalities was commissioned and directed by a partnership of Municipal Affairs and Housing (MAH), the Alberta Rural Municipal Administrators Association (ARMAA), and the Alberta Association of Municipal Districts and Counties (AAMDC). The Steering Committee for the initiative set down the guiding principles and directed that the Strategy be based on a series of practical and workable recommendations that:

- Address rural municipal labour force issues;
- Define solutions for labour force issues;
- Provide insight into how to execute the solutions; and
- Allow rural municipalities, AAMDC and MAH to set their own priorities.

AAMDC MEMBERSHIP ISSUES AND SOLUTIONS

The member municipalities of AAMDC were initially surveyed to collect their opinions on the scope and causes of rural municipality labour issues. A subsequent survey focused on potential solutions for specific labour attraction and retention issues.

The surveys identified specific labour competencies that are difficult to attract and retain, as well as provided an insight into why rural municipalities face particular staffing problems. The top five qualifications that are difficult to staff are:

1. Municipal Planning;
2. Heavy Equipment Operation;
3. Water Treatment;
4. Senior Management;
5. Assessor (Tie); and
6. Mechanic (Tie).

The top five barriers to successfully attracting and retaining staff are:

1. Booming resource industries are viewed as more attractive employers;
2. Rural municipalities are not competitive with wages, salaries and benefits;
3. The size of rural municipal operations limits career moves;
4. Rural municipalities have a smaller labour pool to draw from; and
5. The distance from services offered in major urban centres.

WHAT RURAL MUNICIPALITIES CAN DO

The study focused on the needs of rural municipalities and developed recommendations around eight central themes. The study does not anticipate that any one municipality will adopt all the recommendations. The intent is to provide a broad spectrum of solutions from which individual municipalities will select particular items that address their individual needs. The study provides an outline of the steps to follow to put a plan of action into place.

The recommendations vary in complexity and size and some will potentially require help to implement. Municipalities that have an established human resource function will likely have addressed a number of the recommendations and will be less likely to require implementation assistance.

We recommend that rural municipalities:

Recommendation		Complexity Grouping		
Ref. No.	Description	Change in Practice	Significant Initiative	Requires Professional Help
1.	Look Locally			
1.1	Focus attention on sourcing candidates from non-traditional areas such as retired workers, spouses and family of staff, under-employed residents and the like.	✓		
1.2	Solicit the active participation of their existing staff to act as recruiters for the municipality.	✓		
1.3	Offer scholarships, bursaries and summer employment to local post-secondary students in return for future service as a municipal employee.	✓		✓
1.4	Target recruitment efforts within the local community by reshaping position requirements to fit the skills, capabilities and potential of available candidates.	✓		
1.5	Be more flexible in setting working conditions to attract local staff.	✓		
2.	Look In-house			
2.1	Support development and participate in a Municipal Internship Program-type program designed for existing municipal staff.	✓		
2.2	Facilitate access and opportunity to take education and training programs that address difficult-to-acquire skill sets and reward successful completion of these programs.	✓		
2.3	Develop career paths for each employee in conjunction with a succession plan for the municipality.	✓		
2.4	Develop a municipal succession plan that addresses how key positions will be staffed in the future.	✓	✓	✓
2.5	Develop a strategy to retain the services of retiring employees.	✓		

Recommendation		Complexity Grouping		
Ref. No.	Description	Change in Practice	Significant Initiative	Requires Professional Help
2.6	Consider expanding the work season to enhance the probability of retaining seasonal employees.	✓		
2.7	Consider expanding opportunities for seasonal workers with offers of full-time employment supplemented by education and training.	✓		
3.	Share Resources and Pursue Alternative Service Delivery			
3.1	Enter into a formalized and systematic examination of regional service delivery with neighbouring municipalities.		✓	✓
3.2	Work with neighbouring municipalities to establish mentoring/training programs where an appropriately skilled resource is available to provide training.	✓		✓
3.3	Consider working with neighbouring municipalities to acquire scarce resources that would be shared among the participating municipalities.	✓		✓
3.4	Consider the potential for non-employment solutions for difficult-to-recruit or retain competencies.	✓	✓	✓
4.	Raise the Profile of Rural Municipalities			
4.1	Commit to proactive and persistent participation in local schools' career day program.	✓		
4.2	Include recruitment of municipal workers in all promotional activities related to economic development and tourism.	✓		✓
4.3	Develop or enhance an existing careers section on the municipality's web pages.		✓	✓
4.4	Enlist the aid of employee spouses to participate in the promotion of the municipality as a "good employer" and the community as a "good community".	✓		
5.	Assess the Need to Deliver Services			
5.1	Conduct a review of the services provided to the community to determine if all current service offerings and service levels are valued by residents.		✓	✓
6.	Re-examine Position Qualifications			
6.1	Ensure that a demonstrated desire to live and work in a rural environment receives an equal or higher consideration than candidate qualifications.	✓		
6.2	Review personnel policies and practices that require minimum levels of education and		✓	

Recommendation		Complexity Grouping		
Ref. No.	Description	Change in Practice	Significant Initiative	Requires Professional Help
6.3	experience to re-establish what are mandatory versus desirable qualifications. Focus on recruiting the “family” during the recruitment process by offering to provide employment or employment services to the spouse or other family members.	✓		
6.4	Introduce flexibility in working conditions, subsidization or service provision to enhance recruitment and retention success.	✓		
6.5	Review the municipal minimum levels of certification to ensure that the municipality is meeting the minimum requirements, while at the same time not exceeding them unnecessarily.		✓	
7.	Provide Access and Opportunity for Education and Training			
7.1	Actively work through AAMDC to access education and training appropriate for municipal employees.	✓		
8.	Address Competitive Compensation			
8.1	Review compensation packages on a regular basis, at least every three years, and compensation levels every one to two years, as appropriate.	✓	✓	✓
8.2	Consider supplementing compensation packages with added benefits that provide an incentive to become and remain a municipal employee.		✓	✓
8.3	Consider extending the benefit package to seasonal workers and part-time employees.	✓		
8.4	Actively promote the value of working where you live and the benefits of working for local government.	✓		

ROLE OF MUNICIPAL COUNCILS

Support from municipal councils is fundamental to the success of this strategy. We recommend that rural municipal councils direct administration to:

1. Prepare a human resources plan that identifies current levels of resource competencies and future needs and create a plan to address the gaps.
2. Undertake a formal review of the current municipal compensation plan to determine if the levels of compensation are competitive and to develop a plan to address any shortcomings.
3. Undertake an evaluation of the potential of extending the benefits package to seasonal and part-time workers.

4. Assess how the municipality can and should access the Municipal Internship Program.
5. Conduct a review of current services and service levels to determine if all service offerings are valued by the community's residents.

ISSUES RELATED TO EDUCATION AND TRAINING

The study looked at the spectrum of rural municipal employment positions and identified both the mandatory and potentially desirable competencies required for each position. The study concluded that with a few notable exceptions, education and training are available in the province to address the competency requirements of rural municipalities. The study further concluded that the more pressing issues are ones related to accessing education and training.

MUNICIPAL INTERNSHIP PROGRAM

The Municipal Internship Program (MIP) was examined to determine if the potential exists to extend and expand this program for the benefit of rural municipalities. The study concluded that a number of opportunities exist and recommended that MAH:

1. Continue with current plans to include financial officer and assessor positions within MIP.
2. Further expand MIP to include additional senior management positions including public works/transportation.
3. Broaden and strengthen the recruitment of interns from regional colleges and technical institutes.
4. Further develop and strengthen the regional cooperation approach for the sharing of interns.
5. Develop a MIP-type program for existing municipal staff.

AN EXPANDED ROLE FOR AAMDC

AAMDC is uniquely positioned to provide the coordination and facilitation of human resource services that underlie many of the recommendations. To this end, the study recommends that AAMDC become actively involved by championing the development of standards, practices and templates and by providing the direction for the establishment of specific human resource services. The study recommends that AAMDC:

1. Promote rural municipalities as an employer through the development of promotional materials.
2. Provide assistance to rural municipalities by developing models and templates that can be used to prepare human resource plans.
3. Work with the provincial government to examine all municipal positions that require minimum levels of certification to determine if certification is still appropriate and required.

4. Examine the potential for expanding the current web-based job posting capability so it provides a dynamic medium for both recruiters and job seekers.
5. Examine the potential for developing and delivering regional workshops to establish regional mentoring/training programs and support recruitment and retention activities.
6. Advocate the development and implementation of Workable Solutions' initiatives with rural municipal councils.
7. Provide a coordination and facilitation service linking municipal employment needs with education resources.
8. Consider providing a broad spectrum of human resource services to rural municipalities who require assistance to carry out core human resource functions.

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1. INTRODUCTION TO WORKABLE SOLUTIONS: A LABOUR FORCE STRATEGY FOR RURAL MUNICIPALITIES

The Province of Alberta is in the midst of a prolonged economic boom characterized by a rapidly expanding population that is estimated to be growing at four times the national average (Statistics Canada). Earnings have increased so significantly that Albertans now enjoy the highest income among the 10 provinces.

Additional employment indicators tell the same story. Alberta's unemployment rate in 2006 was almost three percentage points lower than the national average and almost a full percentage point better than its nearest rival (Manitoba). Similarly, the employment participation rate, the percentage of people 15 years of age and older who are employed, is a full six points higher in Alberta than the national average and almost four points higher than its closest rival (British Columbia).

This is the good news; the bad news is that the demand for labour is still outstripping the supply in many areas of competency. Bidding wars for labour are not uncommon and storefront ads that offer cash bonuses for signing on are widespread, and there's no slow-down in sight.

WHAT HAS THIS MEANT FOR RURAL MUNICIPALITIES?

It is very difficult to give one answer to a question about impacts on rural municipalities. Rural municipalities come in a variety of sizes, capacities and capabilities. There is no one prototypical community that can be used as a benchmark or as a standard upon which to compare. For this reason, it is necessary to make the qualification "some rural municipalities" when discussing factors such as impacts, issues, concerns, solutions, etc.

Rural municipalities, like all other employers in the province, are in competition for skilled and competent workers. Rural municipalities often see themselves as being at a disadvantage when comparing themselves to the resource industries in their region, who are typically the major employer. This may be especially true when the sole basis of comparison is compensation.

A major component of this study was a survey of the membership of the Alberta Association of Municipal Districts and Counties (AAMDC). Part One of the study focused on the short- and long-term labour force issues of rural municipalities. The issues identified were then used to explore possible solutions in Part Two of the study.

What emerged from the issues examination is a two-dimensional environment of labour force issues for rural municipalities. Part One of this environment is the traditional view of labour force concerns that stem from the distance and isolation factors that have always existed. Part Two, while also not new, is the misconception of other major companies being better employers than rural municipalities. This perception of disparity appears to have grown and seemingly increases as the comparison becomes more focused on compensation.

From a labour perspective, the economic boom has benefited those who work for employers who are participating in the boom, but certainly not all rural municipalities have participated to the same extent.

The net effect, then, for some rural municipalities has been to find themselves attempting to recruit and retain scarce competencies in a market where labour has the choice about where they work and the ability to demand salaries and wages that are beyond the means of some municipalities to pay.

THE PURPOSE OF THE WORKABLE SOLUTIONS FOR RURAL MUNICIPALITIES

In an attempt to assist rural municipalities in addressing the need for an educated and competent workforce, the AAMDC, Municipal Affairs and Housing (MAH), and the Alberta Rural Municipal Administrators Association (ARMAA) undertook the development of a Workable Solutions Strategy for Rural Municipalities.

Three primary objectives were identified as part of the scope of the Workable Solutions Strategy:

1. Conduct a quantitative and qualitative survey of the AAMDC membership to:
 - a. Identify existing and future labour gaps within municipalities.
 - b. Compile a list of currently practiced employee recruitment and retention strategies.
 - c. Identify threats, opportunities and barriers as they relate to recruiting and retaining municipal staff.
2. Identify practices and programs that encourage labour force participation by non-traditional workforces.
3. Highlight appropriate education and training initiatives by:
 - a. Conducting an in-depth audit of relevant programs/curriculum within Alberta's post-secondary institutions.
 - b. Identifying curriculum that will accommodate municipal staff needs.
 - c. Describing potential pilot programs aimed at developing any new program that targets an identified gap in available curriculum.
 - d. Examining the potential of expanding the current Alberta Municipal Internship Program.

A Steering Committee for this initiative was formed around the three principles identified earlier. The Steering Committee provided direction and support to the resources contracted to prepare the Workable Solutions Strategy.

GUIDING PRINCIPLES FOR THE PREPARATION OF THE WORKABLE SOLUTIONS STRATEGY

The Steering Committee actively participated in the development of the Working Solutions Strategy and set down the principles that guided the preparation of the final strategy document.

In keeping with the objectives and purpose of the Strategy, the Steering Committee provided specific direction that included the requirement for the Strategy to be based on a series of practical and workable recommendations that:

- Addressed rural municipal labour force issues.
- Defined solutions for labour force issues.
- Provided insight into how to execute the solutions.
- Allowed stakeholders to set their own priorities.

The primary stakeholders are rural municipalities, ARMAA, AAMDC, and MAH.

SUMMARY

The following chapters document the results of examining labour force issues for rural municipalities and present our recommendations to address those issues.

2. FOCUSING LABOUR FORCE ISSUES

The Workable Solutions for Rural Municipalities committee stipulated that the Strategy's development must include a survey of AAMDC's membership to identify labour force issues and potential solutions. In this chapter we present the results of Part One of the survey, Rural Municipal Labour Force Issues.

SURVEY OBJECTIVE

The survey offered respondents the opportunity to identify and rank factors that contribute to problems of recruitment and retention of rural municipal staff in both the short and long term. To focus the responses, the survey also asked respondents to identify individual staff positions and functional competencies that are the most difficult to find and keep.

THE TYPES OF QUESTIONS ASKED

The survey, for the most part, is an opinion survey that asks respondents to rank up to five responses to questions concerning the:

- Labour environment of the municipality;
- Economic environment of the municipality;
- Regional cooperation environment;
- Municipal staffing environment;
- Staffing attraction issues;
- Staff retention issues; and
- Problem staffing areas.

The environment questions provided us with validation of the anecdotal evidence about the competitive labour force environment of rural municipalities and its impact on recruiting.

The recruiting issues, as well as the problem staffing areas, brought into sharp focus the competencies that require priority attention.

RESPONSE TO THE SURVEY

Through the efforts of all parties concerned, the participation rate for this survey exceeded 90 per cent. We are extremely grateful to all those who participated and are pleased to be able to provide you with a summary of what was said.

In the following sections we highlight the key questions concerning the issues of attracting and retaining staff and provide a ranking of the responses. Responses were scored using a five-point system; that is, a response that was ranked as the number one reason was scored with a five, a number two ranking received a score of four and so on. For each response, the scores were then totaled to present, in order, the most highly held opinions.

This section contains key items of interest; the complete tabulation is found in the companion document to this report.

1. Why staff are attracted to their municipality

Initially respondents were asked to rank attributes that relate to distances and the size of the community. Table 2.1, *following*, summarizes the responses.

As the responses indicate, a small-sized community is the most highly ranked attribute of rural communities, followed by three other exclusively rural attributes in positions 3, 4 and 5. This provides a very clear clue as to who rural municipalities should be targeting as candidates.

Other attributes of rural communities also provide an attraction as Table 2.2, *following*, summarizes.

Table 2.1
Rank the attributes that attract candidates to apply for positions or positively influences them to accept offers of employment

Ranking	Scoring	Response
1	135	Small-sized community
2	100	Proximity to family
3	94	Proximity to recreational pursuits
4	87	Distance from large urban centres
5	82	Proximity to wilderness landscapes

Table 2.2
Rank these *other* attributes that attract candidates to apply for positions or positively influences them to accept offers of employment

Ranking	Scoring	Response
1	150	Multi-function responsibility
2	90	Dealing with rural issues
3	84	Involvement of the community
4	83	Cost of living
5	76	Opportunities for spousal employment

It is clear that the work environment of rural municipalities (rankings 1, 2 and 3) are significant attractors for staff as are the economic factors of rural communities where the cost of living is perceived to be lower than in large urban centres.

The fifth ranked item, opportunities for spousal employment, is part of a theme that emerged throughout the survey which is the importance of dealing with spousal and family issues when attempting to attract or retain staff.

2. Why municipalities have a problem attracting staff

Respondents were asked to rank communities of the same size and distance from major amenities as they relate to why it is difficult to attract staff. Table 2.3 summarizes the responses.

Table 2.3
Rank the attributes that deter candidates from applying for positions or causes them to turn down offers of employment

Ranking	Scoring	Response
1	109	Small-sized community
2	100	Distance from large retail shopping
3	79	Distance from cultural activities and facilities
4	74	Distance from doctors or healthcare facilities
5	72	Distance from families

Perhaps it is not surprising, but a small-sized community ranks as number one on the list of reasons why people do not want to live and work in a rural community.

Respondents were then asked to rank a series of other attributes that may deter candidates and the results are presented in Table 2.4, *following*.

Interestingly, the number one ranked concern was “Availability of accommodation,” followed by spousal-related concerns. “Cost of living” was ranked number four, followed by another family-related issue, “Limited recreational opportunities for children.”

Table 2.4
Rank these *other* attributes that deter candidates from applying for positions or causes them to turn down offers of employment

Ranking	Scoring	Response
1	129	Availability of accommodation
2	113	Spousal reluctance to relocate
3	108	Lack of job opportunities for spouse
4	67	Cost of living
5	52	Limited recreational opportunities for children
6	43	Inability to specialize — broad scope of work
7	42	Dealing with rural issues
8	30	Recognition as a municipal employee

3. Why staff leaves the employ of the municipality

Retention issues are as significant to rural municipalities as recruitment difficulties. Respondents were asked to rank the reasons that cause staff to leave. The results for the short term (last two years) are presented in Table 2.5.

Table 2.5
Rank the attributes that cause staff to leave the employ of the municipality—
SHORT TERM

Ranking	Scoring	Response
1	155	Salary perceived to be below market
2	100	Takes too long to move up
3	91	Salary not equal to employee perception of worth
4	85	Reached top of the ladder
5	80	Spouse has a new job elsewhere

The “run-away” number-one-ranked reason is the employee’s perception that they are being compensated below market value and/or their salary is below their own perception of worth. Career issues are positioned as reasons two and four, “Takes too long to move up” and “Reached the top of the ladder.”

The same question was asked for the longer term (greater than two years) and the results are presented in Table 2.6.

Table 2.6
Rank the attributes that cause staff to leave the employ of the municipality—
LONG TERM

Ranking	Scoring	Response
1	117	Salary perceived to be below market
2	113	Takes too long to move up
3	104	Reached top of the ladder
4	97	Salary not equal to employee perception of worth
5	61	Spouse has a new job elsewhere
6	61	Doesn’t like working for local government

Compensation issues take up positions one and four, while career issues are slotted in at two and three. It is interesting to note that the career issues are scored much closer to the salary issues in the longer term.

4. Position categories that are difficult to recruit

Respondents were asked to rank, in the long and short term, the position *categories* that were the most difficult to recruit. Table 2.7 summaries the results.

Table 2.7
Rank position categories that are difficult to staff—RECRUITING, short and long term

SHORT TERM			LONG TERM		
Ranking	Scoring	Response	Ranking	Scoring	Response
1	201	Technical	1	178	Technical
2	156	Mid-management	2	142	Mid-management
3	132	Senior management	3	126	Senior management
4	88	Clerical	4	83	Others
5	87	Others	5	74	Clerical

In both the long and short term, technical positions were ranked as the most difficult to staff followed by mid-management and then senior management. These results should not be surprising when we consider that the technical positions are ones that rural municipalities are typically competing for with the resource industries.

5. Position categories that are difficult to retain

Respondents were then asked to rank the same categories for issues of retention. The results are presented in Table 2.8, *following*.

Again, the mobility of technical positions is highlighted by a number one ranking. The positioning of mid-management in the number two position validates the earlier results of career concerns.

Table 2.8
Rank position categories that are difficult to staff—RETAINING, short and long term

SHORT TERM			LONG TERM		
Ranking	Scoring	Response	Ranking	Scoring	Response
1	183	Technical	1	173	Technical
2	133	Mid-management	2	126	Mid-management
3	115	Others	3	102	Others
4	95	Clerical	4	96	Senior management
5	90	Senior management	5	87	Clerical

6. Position qualifications that are difficult to staff

In an attempt to be more specific about which competencies are the most difficult to attract, respondents were asked to rank functional qualifications. The results are presented in Table 2.9.

Table 2.9
Rank position qualifications that are difficult to staff—SHORT TERM (last 2 years) and LONG TERM (more than 2 years)

SHORT TERM			LONG TERM		
Ranking	Scoring	Response	Ranking	Scoring	Response
1	122	Municipal planning	1	62	Municipal planning
2	106	Heavy equipment operation	2	59	Heavy equipment operation
3	94	Water	3	42	Mechanic
4	68	Senior management	4	38	Water
5	61	Assessor	5	37	Mid-management supervisor
6	61	Mechanic	6	34	Senior management

The first two rankings are consistent in the long and short term. The actual scoring would indicate that the difficulty is more acute than it has been in the past. In position three in the short term and position four in the longer term, is utility operators (water plant staff). Senior management, assessors and mechanics round out the top six in the short term.

If anything, the municipal planning difficulty may be understated. Anecdotally, we are aware of the practice of some rural municipalities to contract for planning rather than hire. We understand this practice is driven by the inability to attract candidates, leaving the only alternative of purchasing services on the open market.

3. MUNICIPAL LABOUR FORCE QUALIFICATION AND CERTIFICATIONS

In this chapter we present the results of an “audit” of “post-secondary” programs relevant to rural municipalities to determine if the competency needs of rural municipalities are being addressed. To perform this evaluation the following steps were taken:

- Development of a generic map of typical rural municipal positions.
- Use of municipal and AAMDC websites for position descriptions and employment advertisements to get a more detailed picture of those positions and the related requirements.
- Examination of educational programs and qualifications and the providers who supply them.
- Exploration of the certification processes for different professions and occupations, which includes the completely unregulated (for example, public relations) to the closely regulated (engineers, water systems operators, etc).

This review extended well beyond conventional notions of “post-secondary” education to include almost all of the extensive array of education, training and certification requirements identified by rural municipalities as required or desirable for their positions.

It is important to understand that the information collected for this part of the study is not fixed and the circumstances described will change over time. This will apply to the changing requirements of rural municipalities, as well as to the enormous array of post-high school education and training programs available in the province.

GENERIC MUNICIPAL POSITIONS

While rural municipalities have a core of similar functions, they may organize those functions in different ways and some municipalities may have specific operations (for example, recreational facilities) not generally seen in all rural municipalities. Some functions and positions have not been typical in the past but are starting to emerge (for example, public relations and human resource specialists). The population size of any given municipality, regionalization of services and particular local circumstances will all result in variations from the generic model. Broadly speaking, positions have been grouped under the following typical organizational units:

- General municipal organization (CAO, support staff, including communications)
- Agricultural support services
- Public works, including roads and utilities
- Planning and development, including planning, GIS, development approval, and economic development
- Community services, primarily Family and Community Social Services
- Parks and recreation
- Protective and emergency services, including bylaw enforcement, special constable services, emergency services, disaster management and fire services
- Finance and accounting, including accounting, budgeting, assessment, human resources and information technology

Within these limitations we have created a generic outline of a typical rural municipal organization and its positions (see Appendix A: Generic Municipal Service Functions).

QUALIFICATIONS AND CERTIFICATIONS

With a working model for rural municipal organization, we developed typical qualifications and/or certifications for each position based on a sampling of municipal position descriptions and employment ads. This gave us a list of key educational programs and occupational/professional certifications associated with different positions. The positions and the related educational qualifications and certifications are summarized in a companion document entitled, *Background Information: Job Descriptions and Advertisements*.

From an employment point of view it is important to distinguish between an *educational program* and a *professional or occupational certification*:

- An *educational program* is delivered by public and private educational providers. This involves teaching information and skills content and awarding a qualification for successful completion.

- A *professional or occupational certification* represents the determination of skill or educational standards required for practice in a particular profession or occupation by a duly constituted (under legislation) organization, including a variety of government departments or societies set up for the purpose. Professional or occupational certification is usually based on a combination of approved formal education and training plus specified levels of experience gained while practicing the profession or occupation.

Formal post-secondary educational programs are usually designed and implemented by *educational institutions* in response to demand from prospective students. Employment demand emerges from many employers across a number of industries or may, as in the local government programs of the University of Alberta Faculty of Extension, be a response to a particular subset of employers (i.e., municipalities). Short courses or programs for particular purposes (e.g., occupational health and safety) may be developed and delivered by organizations (e.g., AMHSA for municipalities) set up for the purpose.

Professional and occupational certification bodies usually do not deliver educational programs, although a few do. In most cases certification bodies rely on specifically approved educational programs delivered by others. Most certification bodies also have means established for candidates to have otherwise unapproved courses or programs reviewed for suitability.

Virtually all educational programs of six months duration or longer are approved or, in some cases, accredited (i.e., a process to evaluate and approve quality) by formal approval or accreditation processes mandated by Alberta legislation. The providers of these programs presently include public universities and colleges, private accredited colleges and private vocational schools. In recent years, changes to legislation have brought public and private sector providers into roughly the same approval regime.

Professions and occupations vary with respect to the regulation of entry requirements. A number of restricted professions and occupations may only be practiced by professionals who are certified (e.g., most health professions but also engineering, water and waste water operators).

In a number of professions, use of specific credentials (“protected titles”) is restricted to those who meet qualification requirements laid out by a duly constituted professional body (e.g., CA CGA, CMA designations in the accounting profession). Existence of a protected title does not necessarily mean that practice in that profession is restricted to those having those designations (e.g. you can practice as an accountant without having a protected accounting title). These kinds of restricted designations help raise standards in the profession without restricting entry or practice.

THE PROVIDERS AND THEIR PROGRAMS

We have interpreted the term “post-secondary” as being any educational qualification or occupational certification of interest to rural municipalities. This includes almost any educational course or program which is typically beyond or outside the bounds of high school and which rural municipal employers have identified in position descriptions and job advertisements. This definition moves well beyond the bounds of the public post-secondary system. What follows is a brief overview of the entire system of education and training accessed by rural municipalities.

With this expanded definition in mind, there is a very comprehensive system in Alberta for provision and delivery of education and training. Most of it is public (funded in some degree by public funds) although there is a small private sector at various levels. All of it is regulated in some way by the provincial government and much of the student expense of attendance, even in for-profit providers, is supported by the Student Finance Board under the Minister of Advanced Education and Technology.

The largest and most obvious providers of education and training are the institutions which constitute the province's public post-secondary system: four public universities, twelve public colleges and two public technical institutes. The universities have typically delivered four-year undergraduate degree programs and a wide variety of post-graduate degrees. Colleges and technical institutes have traditionally delivered one-year certificate and two-year diploma programs in a wide variety of areas, typically with a strong employment focus. The difference between a college and a technical institute is largely one of emphasis: technical institutes typically focus on hard technologies, colleges on general education and "soft" human skill programs. Both types of institutions, however, deliver extensive business management programs and overlap in a few other areas.

Public colleges and technical institutes have gradually moved beyond the two-year diploma limitation. Some years ago, a form of "applied degree" was approved for public colleges and technical institutes comprising three years of instruction and one year of work experience. The traditional arrangements have been further modified as public colleges and technical institutes recently acquired the right to apply for approval of four-year undergraduate baccalaureate degree programs. A number of these new degree programs have been approved in the last two years and graduates will soon be appearing; municipal employers will have to consider how they view these credentials. All of these programs and credentials are subject to review for quality by the Campus Alberta Quality Council, a government-mandated accreditation process.

Also in the "post-secondary" realm are a number (currently eight) of private degree granting institutions, often called "university colleges," which have been accredited over many years in Alberta to deliver four-year degree programs.

There are three other systems of "post-secondary" educational providers: private vocational schools, community consortia and the apprenticeship and industry training system.

Alberta's extensive apprenticeship (trades and industry) training system combines all the job training, work experience and technical training (which is typically carried out by public colleges and technical institutes) leading to journeyman certification. Apprenticeship is available throughout the province but requires employer as well as apprentice commitment. Although this system is of major importance to a wide range of employers, only a small number of trades are of interest to rural municipalities, mechanics for example. A lot of effort has gone in recent years into attracting young people into apprenticeships, including permitting apprenticeships to start in high school.

Private vocational schools are typically small, for-profit training providers who offer programs that overlap somewhat with those given by public institutions (often the non-credit continuing education operations of public colleges and technical institutes). Often these are in areas either abandoned or almost abandoned by public institutions. Areas of interest to rural municipalities include office administration, basic software training, etc. Typically programs are less than a year in duration and many are only a few weeks long.

The community consortia are a form of educational brokerage established and funded by the province to assist in the provision of post-secondary educational opportunities in areas not presently served by the post-secondary system. These may be of interest to the rural municipalities in four sparsely populated areas centred on Pembina, Drayton Valley, Drumheller and Blairmore. Their role is to respond to the education and training needs of their regions by negotiating the delivery of appropriate programs by other educational providers. There have been other community consortia in existence in the past whose functions have been taken over by expanding public college jurisdictions.

Finally, we have also identified a variety of short course offerings of importance to rural municipalities, many of which are in the occupational health and safety arena: e.g., Workplace Hazardous Materials Information System training, construction safety courses, other occupational health and safety courses. These are courses typically delivered by employers or by employer-supported organizations (e.g., AMHSA, the Alberta Municipal Health and Safety Association). Another important area is coursework for water and waste water operators which are delivered by a wide variety of providers, including large municipal employers.

THERE APPEAR TO BE FEW GAPS

Subject to the comments below, we have not identified any rural municipal employment needs for which suitable training is not available somewhere in the province. This view is generally supported by our survey where most respondents felt that available post-secondary qualifications and certifications were satisfactory. The major problems appear to be those of the level of annual supply of graduates in relation to demand and the problems of accessing education from more remote municipalities.

Although these statements remain broadly true, there are three specific training areas that require further comment:

- **Grader operators** are in short supply and there are no training programs in the province that target this occupation. There are a small number of introductory programs aimed at heavy equipment operation in general, but none focused on grader operators in particular. The longstanding Keyano College program has shifted its emphasis from road building to heavy equipment skills associated with oil sands development. A new program at Olds College will also be introductory in nature. Grader operators have traditionally been developed by on-the-job experience with construction companies. Operators start on simpler equipment and move on to increasingly more sophisticated equipment, with graders at the higher end of the skill spectrum. This reflects the fact that the physical skills and judgment required for grader operation can really only be developed by doing. Another reason that heavy equipment training doesn't go beyond the introductory level is the very high cost of capital investment and the difficulty of keeping that equipment up-to-date. This has led us to suggest the notion of on-the-job training under mentorship within the road construction and maintenance operations of municipalities or groups of municipalities.
- **Municipal assessors** are also apparently in short supply although, in this case, there are programs available in the province or in an adjacent province. The Lakeland College Business Administration diploma with a major in Appraisal and Assessment, and the University of British Columbia diploma in Urban and Land Economics are approved

programs that meet the core education requirements. The Lakeland College program is a major supply source for those entering the assessment field in Alberta. It is capable of expansion but the College is having some difficulty getting an accurate assessment from related professional bodies of the supply shortfall and the kind of response it should be making to it. Its current graduates are getting employment but not always immediately. Without support from the profession, it is unlikely that the College will see reason to expand.

- **Municipal planners** are currently difficult for rural municipalities to find and attract to employment. This appears to be especially true in more remote communities and is one of the reasons that some municipalities have banded together to provide regional planning services. There is one major supplier of university-level graduates in the planning field: the Faculty of Environmental Design's Master of Environment Design (Planning). There are several four-year undergraduate programs (typically programs in urban geography rather than planning) which also relate to municipal planning. There are also undergraduate planning degrees offered at several out-of-province universities. The University of Alberta's Faculty of Extension offers a certificate program in planning (ALUP) for those already employed, although the grounding offered is almost certainly more limited than a university degree program.

There is some perception that these options, including the University of Calgary's Master of Environmental Design (Planning), do not adequately meet the needs of municipal planning although clearly all are referenced by rural municipalities in their employment searches for planners. It is our understanding that Alberta Municipal Affairs and Housing is seeking the development in Alberta of a planning-specific undergraduate degree program to fill this perceived need.

THE ISSUE OF SUPPLY

Supply in relation to demand may be problematic in some programs areas (e.g., the supply of assessors is limited, to some extent, by the scale of programs which train assessors), but evaluating this kind of situation is complicated by the difficulty of predicting demand (which may be a current problem) and adjusting supply (which may take several years to have effect). There may be differing opinions, depending on perspective, about whether or not there is a shortage (a situation which appears to complicate evaluation of assessor shortages).

It is clear, also, that the province is in an extraordinary period of growth based on oil sands development. This is affecting many industries, including municipalities in general, and rural municipalities in particular. Generally speaking there are two major effects: one, pay levels are generally increasing across most occupational categories and two, there are severe shortages in specific categories which may affect rural municipalities (e.g., grader operators).

The ability of the education system to respond may be limited in a number of ways: by resources, by the time it takes to educate or train expanded cohorts of students and by the difficulty of competing with highly paid employment for the interest of students.

THE ISSUE OF ACCESS

Another issue is local or regional access to education and training programs where the ability to travel is complicated by existing employment, by distance and by expense to the student who may also have family commitments. Public and private education and training providers are often willing to respond to interest in their courses and programs by developing local delivery, but have to deal with the costs. Even providers supported by public operating and capital grants have real limitations on their ability to deliver. They may have excess capacity in their campus classrooms and sufficient administrative strength and support services to support expansion, but cannot afford the out-of-pocket marginal cost (primarily instructional salaries) of providing local delivery to meet special needs.

Typically, they will have to finance the marginal costs of doing so by attracting revenue either from students or from employers, and by getting some guarantee that sufficient students will enroll and pay fees over the life of a program cycle. This may present a challenge, in turn, to any employer interested in seeing their employees upgrade or change their qualifications. Institutions, especially colleges and technical institutes, have considerable base strength and may be interested in local delivery but this has to be recognized by municipal employers as something to be negotiated and paid for.

One of the major developments of the last 20-30 years has been the widespread availability of distance education which typically tries to free students from the constraints of time and place, i.e. as a student you can work at the program on your own time and where you want. There are cost limitations even here: turning a program of studies into a distance education format (online, Internet-based or print- and telephone-based, for example) involves a significant investment up front; most such programs have a support network for students that has financial implications and, finally, some skills have to be taught in-person to be effective. Once distance education versions have been established, such programs may offer substantial value in terms of easy access and the ability to collect sufficient students across a wide geographic area.

OTHER ISSUES RELATED TO EDUCATION AND TRAINING

In addition to supply and access, there are a number of other issues directly related to rural municipalities:

1. Some Positions are in a State of Flux in Relation to Required Qualifications

For instance, several chief administrative officers (CAO) pointed to the pressure they feel to hire accountants with one of the three protected accounting titles. This pressure is not to address normal municipal accounting needs but to respond to the sophisticated accounting challenges posed by the push to evaluate long-term assets, like roads and bridges, or long-term liabilities related to pension that have not been recognized in the past.

2. Qualifications Required for CAOs Appear to Vary Widely

The education and training of CAOs has been covered to some extent in the periodic survey of CAOs commissioned by MAH. The Ipsos-Reid report, *Training Priorities and Succession*

Planning (April, 2004), based on the 2004 CAO survey, indicated that, at that time, only 28 per cent of all provincial CAOs held university degrees, a further 14 per cent had “some university” and 48 per cent held college or technical institute diplomas¹. Going back further to the 2001 Nichols Applied Management Report on the 2001 CAO survey gives a broader, although more dated, picture: 22 per cent of CAOs had a university degree; 68 per cent had some post-secondary or diploma or certificate; 10 per cent had high school or less².

More detailed descriptions in the 2001 report by age, by type of municipality and by discipline are interesting in some respects:

- The distribution by age shows that the heaviest weighing to degree level education is in the 45-49 year age category (35%), and is decidedly lower amongst older CAOs (which is predictable), but also amongst younger ones. In all cases holders of “some post-secondary, diploma and certificate” qualification is much higher than holders of degrees.
- The distribution by type of municipality shows that cities have 71 per cent of CAOs with university degrees and 29 per cent with other post-secondary degrees. Rural municipalities reverse these proportions: 33 percent of county CAOs have degrees and 62 per cent have some post-secondary degree or diploma or certificate qualifications. For municipal district CAOs, the proportions are 72 per cent with some post-secondary degree, diploma or certificate qualifications and 20 per cent holding undergraduate degrees or higher.
- Distribution by educational discipline places business or commerce at almost twice the level of the next disciplinary area, public administration, with “general arts and humanities” placing third. Engineering and recreation share fourth place³.

To some degree the variety is not surprising when one considers the wide range of municipal size and complexity.

The current Municipal Internship Program for Administrators (MIPA) has operated as if a four-year university degree was the minimum qualification for a CAO. This is not built into the regulations, but almost no MIPA interns come out of college or technical institute diploma programs.

The reality of existing CAO qualifications is quite different. Clearly, existing rural municipal CAOs have educational qualifications heavily weighted to something other than university degrees. Many do not have a university degree and may not have a post-secondary qualification at all. Although the objective of raising CAO education levels is laudable, we think it likely that experience is probably a much greater determinant of CAO skill set than the basic post-secondary training. With the MIP in mind, we think the question of appropriate qualification levels for CAOs should be further explored in the next AMAH CAO survey.

1 Report of CAO Survey 2004: Training, Priorities and Succession Planning, April 2004, pg 10.

2 Education and Training Profile, Final Report, Municipal Administrators Survey, February 2001, pg. 8.

3 Ibid pg 10.

3. Another Area of Potential Weakness is Career Laddering

“Career laddering” is the process of improvement in educational qualifications for employees working their way up the educational ladder through connected programming from preliminary qualifications at the certificate level, on to appropriate professional master’s degree qualifications (in management or planning, for instance). There appear to be some anomalies in the way of this kind of progression which may limit the ability of municipalities to encourage ambitious employees to move to areas of greater need.

This province has a remarkable history of encouraging the connections between one level of education and training and another (through mechanisms like the Alberta Council on Admissions and Transfer). Alberta post-secondary institutions (specifically universities) are much more receptive to connections between diploma and degree levels of education than they used to be.

However, the needs of a specific industry, like municipalities, have to be pursued persistently if clear cut pathways are to emerge and be used. What is the utility in continuing the professional education of municipal administrators or planners, for instance, through local government programs delivered by the University of Alberta’s Faculty of Extension? They appear to offer an excellent way for municipal administrators or planners to upgrade their qualifications. Athabasca University is well placed to respond to this possibility but the University of Alberta, itself, finds it very difficult to give credit for its own extension certificate programs. These kinds of issues need to be pursued but they take time, effort and an understanding of the post-secondary system (see recommendation # 7.1).

PROFESSIONAL AND OCCUPATIONAL CERTIFICATIONS

Because municipalities carry out a number of functions involving the health and safety of residents, there are often legislated requirements for the competence of the employees hired to carry out those functions. As can be seen in Appendix B: Qualifications and Certifications Map, the range of professional and occupational certifications utilized in rural municipal employment is very extensive and complicated. In some cases these are unique to municipalities (e.g., water and waste water services); in other cases, municipalities deliver services which require using people who have a widely used but regulated designation (e.g., professional engineer).

The following description of a “regulated occupation” is useful:

“Regulated occupations have legal requirements or restrictions with regard to licensing, certification or registration. They are professions (e.g., forester, lawyer, nurse, teacher) and trades (e.g., electrician, heavy equipment technician, plumber, welder) that are controlled by law to protect the public.”⁴

Within the context of “regulated occupations,” there are some restricted activities which may only be carried out by persons having specified occupational certifications which are regulated, typically, by professional regulatory organizations under provincial legislation (only lawyers may give legal advice; only engineers may carry out defined engineering activities; only certified water and waste water operators may operate municipal water systems, etc.).

⁴ Alberta Human Resources and Employment CERTinfo Website.

Another layer of regulation is represented by “protected titles”; these are specific professional titles that may only be used by persons who have completed requirements laid out by a professional regulatory organization (for example, chartered accountants). Unlike the legal profession, which is restricted, it is possible to practice some professions without having the protected title (for example, you can practice as an accountant without being a chartered accountant but you may not call yourself a chartered accountant without meeting the requirements defined by the relevant association).

There are a wide variety of protected titles (for example, CLGM, Certified Local Government Manager, is a protected title developed by the Society of Local Government Managers based on the educational programs developed and delivered by the University of Alberta, Faculty of Extension) typically developed by a professional association to support and improve competency levels in a given profession or occupation under the Professional and Occupational Associations Registration Act (POARA). Unless also defined as a restricted activity, these certifications may be specified by an employer seeking the reassurance of the certification but not the requirements to practice. This is an evolving field with a tendency for unrestricted professions and occupations to want the recognition that comes with a protected title.

LABOUR FORCE QUALIFICATIONS AND CERTIFICATIONS CONCLUSIONS

As we have already stated, we do not see any major gaps between the requirements of rural municipalities and the program offerings delivered by Alberta-based suppliers.

In support of this conclusion there are a number of relevant observations:

- There are a large number of education and training programs of interest to rural municipalities. There are also a large number of professional or occupational certifications (see *education and training programs vs. professional and occupational certifications*, above).
- We have identified current qualifications and certifications as comprehensively as possible, going well beyond the notion of “post-secondary” education; these are summarized in Appendix B: Qualifications and Certifications Map and encompass everything from grader operators to engineers, from accountants to pesticide and nuisance control certifications.
- Qualifications and certifications are not a fixed quantity and the standards of municipal employers, the availability of programs of education and training providers, as well as the nature of professional and occupational certifications will change over time. Staying on top of this shifting ground may be difficult for some municipal employers. A centrally operated qualification and certification information and brokerage service may be a solution.

The issues are in the access by employers, employees or potential employees to specific education and training programs at any given time or place necessary or convenient to meet local needs, or in the overall supply of graduates in relation to demand.

For those education and training qualifications that would be of interest to existing municipal employees or to prospective municipal employees in remote locations, the issues are likely to be access and cost to the individual.

Better pathways from one level of qualification to another can be developed for municipal employees but need to be constructed in cooperation with post-secondary institutions. This requires persistence over time and a good understanding of the capacity and limitations of the post-secondary system.

As training organizations (public or private) typically require a minimum cohort size to deliver in-persons, which may be difficult for any given municipality to muster, other solutions may have to be found to this type of problem including:

- Supporting leave, travel and expenses for employees to go to where the course or program is being delivered. The more complicated and lengthy the offering, the more expensive this becomes.
- Encouraging maximum use of distance education opportunities and perhaps building in support for employees to access Internet-based or other forms of distance education.
- Combining with other municipalities to generate enough employee/student interest to meet the minimum costs of in-person delivery of courses or programs. This has worked, to some extent, with rural-based professions like social work, but it takes effort and commitment as well as a coherent relationship with the training deliverers.

4. THE INTERNSHIP PROGRAM—EXAMINING THE POTENTIAL

OVERVIEW OF THE PROGRAM

Program Mission, Vision, Objectives

The Municipal Internship Program provides a funded work experience program in Alberta municipalities to encourage younger, suitably qualified people to enter senior municipal administration.

The program was re-established in 2002 with some changes and improvements. By 2006, 34 interns had been placed, of which 22 are currently employed in local government. Of those 22, however, six are employed in either the provincial government or in municipal associations and agencies, leaving 16 working for local government. Of those, four are located in rural municipalities, a number roughly in proportion to the number of rural municipalities.

The specific driving concern behind this program has been the impact on municipal administration of the pending retirement of many CAOs. A study by Ipsos-Reid in 2004, commissioned by Municipal Affairs and Housing, indicated that 44 per cent would likely leave the field within six years, 67 per cent within 10 years and 79 per cent within 15 years.

In the current year (2007-08), the MIP has introduced a second stream of interns focused on municipal planners and planning. This is a welcome response to both the comments of CAOs in the program's CAO Survey and the 2005 Nichols Applied Management evaluation of the program. In both cases, recommendations were made to broaden the program to include employment categories other than senior management, with planners being a key option. Effective this year, the senior administrative stream is called Municipal Internship Program for Administrators (MIPA) and the planning stream is Municipal Internship Program for Planners (MIPP). The new stream will be discussed briefly in a separate section below; otherwise descriptions and comments refer to the MIP for Administrators, the only part of the internship program with a track record.

The stated objectives of the MIPA are as follows:

- “to assist Alberta municipalities in their succession planning efforts to recruit, train and retain competent municipal employees who can progress into leadership positions;
- to encourage more individuals to enter the local government field and offer recent graduates who are interested in a career in municipal administration the opportunity to have first-hand, real-life, practical experience and training in the Alberta municipal environment; and
- to assist Municipal Affairs and Housing in meeting its goal of fostering ‘an effective, responsive, cooperative and well-managed local government sector’ by encouraging and providing Alberta municipalities with the tools and programs to improve self-sufficiency.” [MAH Municipal Internship Program Website.]

Program Parameters

Following are key characteristics of MIPA:

The program provides for 12 months of work experience training for each intern.

- Currently the program allows for placement of 15 interns per annum, an increase from 10 at the time of the 2005 program review.
- A grant of \$36,000 is provided to each participating municipality to support the hosting of an intern: \$25,000 towards wages, \$2,000 towards benefits and \$9,000 towards expenses for such things as travel associated with training. Municipalities are expected to supplement these categories, as appropriate, given cost of living and wage scales within the municipality (see below).
- MAH provides a three-part series of training workshops for interns intended to familiarize them with Municipal Affairs and Housing and other provincial departments.
- MAH has also developed an internship workplan and workbook to help interns and host municipalities.
- It is important to note that existing municipal employees are specifically excluded from the internship program.

We understand that the guidebook and workplan are being developed as professional development material for municipalities. MAH is also developing materials aimed at school children starting at Grade 6 which will explain local government and begin to promote the idea of working for local government as a viable career option. These are both excellent initiatives and are consistent with the overall thrust of the workable solutions.

Sourcing and Selection of Candidates

The selection process is well-laid out:

- MAH promotes the program by sending printed program and application information to all Alberta universities, to all Alberta colleges and technical institutes and to selected non-Alberta universities. There is also a section of the MAH website devoted to the internship program. Department staff responds to requests for classroom presentations and go to a number of provincial and extra-provincial career fairs.
- MAH staff selects short-listed candidates on the basis of the applicant's completion of an "intern application package." No interviewing is done at this stage. All applicants who meet the criteria are short-listed.
- Criteria for short-listing include the following:
 - "A recently completed post-secondary degree or diploma."
 - "A desire to experience and learn the functions of a municipality."
 - "Work or volunteer experience that is related to the skills needed in municipal administration ..."
 - "Willingness to relocate to host municipality if necessary."
 - "Work, educational or volunteer-related references."
- Short-listed candidates select the municipalities who will receive their profiles.
- Within this limitation, short-listed candidate profiles are given to the current year's participating municipalities who choose the candidates they want to interview (an important difference from the old program):

"Beyond the initial short-list provided by the Ministry, host municipalities will be responsible for all aspects of intern selection. Municipalities will compete to offer the best possible remuneration package to interns. Various determinants may impact an intern's decision to select a particular offer, with salary only being one factor. Other issues to consider may include:

- *location and cost of living of the municipality;*
- *size of the municipality;*
- *services available within the municipality;*

- *quality of the municipality's Workplan [for managing an intern]; calibre of proposed supervisor; and non-monetary compensation.*" [MAH, Municipal Internship Website.]

Selection of Participating Municipalities

A selection process is also used to pick municipalities:

- MAH invites applications from Alberta municipalities, reviews the applications and chooses the municipalities who will participate for that year. Criteria for municipality participation are as follows:
 - A population between 700 and 100,000.
 - Strong relationship between council and administration and strong commitment from both groups.
 - "Organizational commitment to the internship program vision and goals."
 - Sufficient commitment of resources (see above).
 - "... an ability to provide training in a wide range of municipal functions, and interest and sharing knowledge and experiences with the intern and working with the intern to complete the Workplan." [MAH, Municipal Internship website].
- Joint applications from two or more municipalities who may be too small to otherwise meet these criteria, are an important innovation to allow access for smaller rural and small urban municipalities. There have been several successful examples.

2005 EVALUATION OF THE MIP FOR ADMINISTRATORS PROGRAM

In 2005, a formal program evaluation of MIPA was conducted by Nichols Applied Management. The review involved interviews and surveys of interns who had participated in the program since 2002, CAOs of host municipalities, and alumni of the original MIP who were still working in the local government sector in Alberta. An interesting component was the separate survey of CAOs of non-participating municipalities. This review was presented in July of 2005 and is the most recent evaluative material about the program. A series of recommendations were included, a number of which have been implemented.

The review reports the overall success of the program with comments similar to this:

"Overall, impressions of the program are very positive. No major weaknesses of (sic) fundamental flaws in the mandate or delivery of the program were identified through the interviews with interns, hosts and alumni." (2005 MIP Review, pg 10).

The report also points to major improvements in the MIP over the earlier version (including financial support for salaries and equipment and "training, information, workshops and orientations." (2005 MIP Review, pg 9)). There have and continue to be ongoing changes and

adjustments in response to the 2005 Review. The report reflects the view of hosts that the quality of interns is very high (MIP Review pg. 10). It is clearly a critical component of any strategy to bring new people into local government in Alberta.

The review reported a number of concerns and from those concerns developed a number of recommendations, some of which are of importance to rural municipalities:

- Various opinions on appropriate size of municipalities for participation led to recommendations 2 and 3: number 2 recommending that minimum size be raised to between 2,500 and 5,000 and number 3 that maximum size be increased to 100,000 to accommodate growing urban areas (e.g., Wood Buffalo with Ft. McMurray). The minimum limit remains at 700 and the maximum has been increased to 100,000.
- Recommendations 5 and 6 encourage “shared hosting” as a way of permitting small municipalities to participate, although at least one participant in shared hosting has to meet the minimum size limit and would be the designated host municipality.

Issues from non-participating municipalities

This section of the report is particularly important for workable solutions purposes because it attempted to survey non-participating municipalities.

Of those who responded, approximately one-half had considered participation. Reasons for not participating included:

- Insufficient time to manage an intern.
- Financial constraints making it difficult to identify funding.
- Lack of space to accommodate an intern.
- Municipality not large or diversified enough to accommodate the range of experience expected; small municipalities do not have enough staff to provide the required training or is not involved in the delivery of all.
- Municipality too remote to participate.
- Timing is inappropriate but dictated by how long they (presumably the CAO) have worked in the community, the experience or comfort level of the council and the priority given to internship relative to ongoing projects.

Suggestions for improvements from non-participating municipalities included the following:

- Several recommended that MIP be expanded to specific areas such as planners, assessors, and financial officers. [Note: the recent implementation of a “planners” stream.]
- Expand the program to include experienced people from the private sector, other areas of government and existing municipal employees.

THE MUNICIPAL INTERNSHIP PROGRAM FOR PLANNERS (MIPP)

Built on the same model as the MIP for Administrators, this program is entering its first year of operation; there are some variations from its sister program:

- Same general objectives as MIP for Administrators.
- Specific purpose is to attract recent post-secondary graduates to municipal planning.
- Two-year period (vs. one for most other interns, although even in the MIP for Administrators expansion to two years is being piloted).
- Starting in 2007-08 with seven internships available; host municipalities have been selected and the intern application and hiring process is currently underway. As with MIPA, the first communities reflect the fact that interns are easier to place in or near significant urban centres such as Grande Prairie, Red Deer, Strathcona (Edmonton), Canmore (Calgary) and Lethbridge.
- Municipal population lower limits have been increased to 5,000 (100,000 remains upper limit).
- Because small municipalities (rural and small urban) have often banded together to provide regional planning services, regional planning services are also allowed to participate. The first group of municipalities includes two regional planning services, the Oldman River Regional Services Commission located in Lethbridge.
- Funding has been increased from the standard for MIP for Administrators: \$41,000 in the first year to \$19,000 in the second year.

OBSERVATIONS ABOUT THE MUNICIPAL INTERNSHIP PROGRAM

In summary, we see the following points as important factors to build upon:

1. An overall success for Alberta municipalities

It is clear that as a whole the Municipal Internship for Administrators is an important program for municipalities and that it has been successful in recruiting new people into municipal government employment.

Our perspective is that internships are a critical concept for workable solutions for rural municipalities and we assume the continuation of the two streams of the MIP in the future. There are concerns and issues but – in line with comments and recommendations in the 2005 MIP Review, the MAH's Survey of CAOs and our own survey – they are focused on improving and expanding the program.

2. Difficult for small, rural municipalities to access MIP

Reviewing the information available on the Municipal Internship Program for Administrators, one key characteristic became clear: it is difficult for small and/or more remote municipalities (both rural and small urban) to participate.

From inception in 2002-03 until 2007-08, some 69 (one remained to be determined for the current year) municipalities have hosted or are hosting administrative interns. Although it is a very subjective exercise, we attempted to assess the spread of interns in terms of location (proximity or highway access to significant urban centres) and participation. A significant majority (we estimate about 65%) of interns were placed in municipalities either close to or near highway reach of a significant urban centre. It is surprising and a positive aspect of the Municipal Internship for Administrators program that it has placed the remaining 35 per cent in more remote communities, although it is evident that the more remote the community the less likely it is either to apply for or place an intern.

MAH has recognized this and, as noted above, encourages smaller municipalities to collaborate in developing internship proposals and in carrying them out. So far there have been five such collaborations typically involving both rural and small urban municipalities.

3. Keeping interns in the system

The current MIP for Administrators appears to be having a reasonable degree of success at keeping interns in the Alberta local government (22 out of 34 are still in some aspect of local government) despite the competition from a heated labour market over most of the life of the existing MIPA. Viewed from the perspective of rural municipalities, however, only four have remained in rural municipalities with another three in specialized municipalities [Note: there are only three with two, at least, incorporating significant “hamlets” that would otherwise be significant cities – Sherwood Park and Fort McMurray].

The effect is that although MIPA has had some real success in placing interns in less accessible (although not the most remote) parts of the province, it cannot be said to have resulted in interns being employed in those areas.

It is reasonably clear from the 2005 MIP Evaluation Report (see reference to non-participation above) and from discussion with program administrators, that a significant part of this challenge is that small and/or remote municipalities don’t respond to the opportunities provided by MIPA to place interns or to hire them when the internship is over. We think that all rural municipalities, but especially non-participating ones, should be encouraged to look more closely at MIP and at how to support and use it.

4. Interns come from a limited pool

The difficulty of attracting interns to work in more remote rural and small urban communities requires new solutions. In particular, we think that there is a connecting link between the types of interns sourced and the relative lack of success in getting interns who are prepared to go to more remote rural placements and ultimately work there.

The issue of “community fit” applies here: we think that if more interns with rural backgrounds and in programs with a rural emphasis could be attracted, the ability of the MIP and any related or more specialized internship to place and retain interns in rural

municipalities would be enhanced. Although information on intern personal backgrounds was not available, it is our view that interns with a personal background in rural life, plus an appropriate diploma or applied degree, would appear to be better prospects for successful retention and for success in the work in many rural municipalities.

Another key characteristic of the program is the type of educational background of interns who apply and are selected. As the program presently functions, the interns applying to the MIP for Administrators are heavily weighted against those who hold four-year university degrees. Nothing in the program regulations excludes diploma holders but the program statistics for the last complete year, 2006-07, make it clear that few diploma holders apply and even fewer are selected.

In the most recent completed year, 2006-07, of approximately 56 intern candidates, 40 were short-listed; all were university degree holders. Of the 40, 15 came from the U of Alberta, eight from the U of Lethbridge and four from the U of Calgary. The remaining 13 come from a small number of non-Alberta universities. In addition to this effective, if unintended emphasis, most of the interns come out of the faculties of arts and, of those, the largest contingent is from political science programs. Historically, the largest grouping of CAOs with post secondary qualifications has come from business or commerce programs although faculties of arts have been a significant source.

The effective sourcing of interns amongst graduates of university four-year programs means that a wider pool of competence is effectively excluded. Although not necessarily intended, the effect is that four-year degree graduates are assumed to be better equipped to become municipal administrators than those with other forms of post-secondary qualification. Given the nature of rural municipal administration, it is likely that a more hands-on form of qualification delivered by colleges or technical institutes would be just as appropriate. It might be more appropriate to the administration of a smaller rural or small urban municipality than a major in political science or economics from a university. This would not be a major change in direction but a shift in emphasis allowing wider participation and wider choice for municipalities.

In addition to longstanding college and technical institute diploma programs in areas such as business, accounting, civil engineering technology, environmental management etc., Alberta colleges and technical institutes are in the midst of a transition that started a decade or more ago to a wider variety of degree programs delivered by institutions other than universities (four-year applied degrees including a year of organized work experience; four-year baccalaureate degree programs at colleges and technical institutes). There are also longstanding and very credible four-year baccalaureate degree programs delivered by eight accredited private colleges. It is interesting to note that very few people apply to MIP from private colleges.

If additional streams for finance officers and assessors come online, then the issue of wider sourcing of candidates becomes even more critical. These potential new streams are unlikely to be able to source adequate numbers of candidates by effectively drawing only from university programs; the competition from other industries with deeper pockets for accountants trained at universities is likely to be too great. In our view, selected business programs at colleges and technical institutes offer a much better option. In regional colleges with a significant rural catchment area, the chances of getting accounting and finance students, especially those with a rural background, is likely to be greater.

Some of the rather narrow range of intern sourcing may be due to the way in which the program is promoted. With limited staff, the MAH responds to those institutions who express an interest, most obviously the Political Science Department at the University of Alberta which is, by definition, interested in government and close by. It may be that widening the pool will require some proactive effort on the part of the Department to interest a wider range of institutions and their students. If the program administration actively marketed the internship opportunity to three or four of Alberta's rural-based regional colleges, it would likely attract interns not only with different kinds of qualifications, but a higher proportion with rural backgrounds.

5. Fewer Candidates

Another troubling recent statistic is the sharp drop in the number of candidates in 2007-08 over 2006-07. It remains to be seen if this is a temporary or more permanent condition. We are concerned that, in the context of the heated employment market in Alberta, this may be a longer-term phenomenon. If it is, then there is another argument to ensure that a wider pool of candidates is addressed. MIP administrators indicated that the quality of candidates placed remained very high despite the drop in numbers.

A significant line of thinking addressed by a number of CAOs interested in the MIP for Administrators is the, perhaps unintended, focus by interns on becoming CAOs at the earliest opportunity. Our view is that the focus of the current MIP should be less on CAO positions than on a wider variety of administrative positions, CAO possibly being amongst them.

6. Development of existing rural municipal management strength

The MIP for Administrators specifically excludes people who are currently employed by municipalities. Within the objectives and characteristics of the current MIPA that makes some sense: an overarching aim is to draw new people into senior municipal administration, reflecting the concern about replacement of CAOs (and, presumably, other senior administrators).

We believe, however, that another very important source of senior administrative strength for municipalities and rural municipalities in particular, is missed by this restriction. A classic example, raised by several CAOs, is the number of existing rural CAOs who started off their administrative careers in the management of recreational facilities; one longstanding CAO in a major rural/urban noted that successfully managing a recreational facility in a small town (where they are typically located, even if supported by the adjacent municipal district or county) gives that person all the political and administrative skills and experience required to succeed as a rural CAO.

Many rural CAOs have progressed along this route. Consideration should be given to an internship program (not necessarily the existing ones) that actively supports the development of junior managers already within the system.

5. FINDING SOLUTIONS TO MUNICIPAL LABOUR ISSUES

The various facets of a Workable Solutions for Rural Municipalities have been discussed in the preceding chapters; labour force issues were identified in the Workable Solutions Survey,

competencies and the availability of providers for education and training were examined in the “audit,” and the potential of the Municipal Internship Program have all contributed to understanding of the needs for a Strategy.

In this chapter, we present the solutions offered by the AAMDC membership. In a manner similar to the Issues Identification Survey, the membership was asked to respond to a series of questions concerning potential solutions to recruitment and retention problems, and to suggest roles that could be played by various stakeholders to assist rural municipalities with labour force issues.

Survey results were provided by over 50 per cent of the membership and their participation is again greatly appreciated.

What respondents said about:

1. Approaches that respondents have used successfully to attract and retain staff in the short term

Respondents were asked to rank the tactics that they had used in the last two years to successfully attract or retain staff. The results are presented in Table 5.1, *following*.

The top two responses in the short term indicate a direct response to the issues of compensation. Salary and benefits are still perceived as the biggest issue and as a consequence have to be dealt with before other considerations are put into play.

2. Approaches that respondents have used successfully to attract and retain staff in the long term

Respondents were then asked to rank the same tactics using a longer-term perspective. The results are presented in Table 5.2, *following*.

Table 5.1
Rank approaches that you have used successfully to attract and retain staff—SHORT TERM

Ranking	Scoring	Response
1	117	Meeting income demands
2	61	Providing extra benefits
3	52	Hiring an unqualified person and training them
4	47	Advertising outside the local area
5	40	Giving preference to local candidates
6	34	Other inducements
7	21	Changing the scope of work to fit candidate
8	21	Direct recruitment — targeted candidates
9	17	Relaxing the position qualifications

Table 5.2
Rank approaches that you have used successfully to attract and retain staff—LONG TERM

Ranking	Scoring	Response
1	104	Meeting income demands
2	48	Advertising outside the local area
3	39	Providing extra benefits
4	37	Hiring an unqualified person and training them
5	36	Other inducements
6	36	Giving preference to local candidates
7	30	Working hours or days per year
8	24	Direct recruitment — targeted candidates
9	18	Relaxing the position qualifications
10	18	Changing the scope of work to fit candidate

Meeting income demands is still the preferred strategy to attracting and retaining staff. While municipal employers are not unique in this approach, it is apparent from the list that a variety of different approaches are capable of addressing problems with sourcing qualified candidates and subsequently retaining them.

3. Perceptions that put barriers in the way of successfully attracting and retaining staff

We asked respondents to rank the perceptions about rural municipalities that create barriers. In asking this question we are looking for the key themes that need to be addressed when marketing rural municipalities as good places to work. The responses are presented in Table 5.3.

Table 5.3
Rank the perceptions that put barriers in the way of successfully attracting and retaining staff

Ranking	Scoring	Response
1	124	Not competitive with compensation and benefits
2	57	Unique skills are required
3	57	Too much work and not enough support
4	41	Municipal government is a workplace of last resort
5	40	Prior government experience is required
6	34	Generally unattractive workplace
7	32	Unchallenging work

Not surprisingly, compensation again tops the list. What is also interesting is the list of other perceptions that need to be addressed when communicating with potential candidates. For the most part the responses fall into two categories: skill requirements and unappealing work or workplace.

4. Realities that put barriers in the way of successfully attracting and retaining staff

Respondents were then asked about realities, as opposed to perceptions, that need to be addressed. The responses are presented in Table 5.4, *following*.

The ranking and scoring suggest that resource industries are more attractive employers and that rural municipalities do not offer competitive compensation packages.

Table 5.4
Rank the realities that put barriers in the way of successfully attracting and retaining staff

Ranking	Scoring	Response
1	146	Booming resource industries are viewed as more attractive employers
2	90	Municipalities are not competitive with wages, salaries and benefits
3	60	Size of municipal operations limits local career moves
4	58	Rural municipalities have a smaller labour pool to draw from
5	48	Distance from services offered in major urban centres
6	32	Answerable to politicians
7	22	Answerable to the general public
8	19	Interacting with rural residents, politicians and co-workers

5. Approaches that will have the highest possibility of success for attracting and retaining staff in the short term

Respondents were asked to rank a series of possible approaches that would better position rural municipalities to address recruitment and retention issues. The results are presented in Table 5.5, *following*.

Not surprisingly, competitive compensation packages was ranked number one. The magnitude of the scoring for this single dimension should not overshadow the list of other potential approaches. There is no question that compensation is a significant and fundamental factor, but it is not the only factor that has to be overcome if the perceptions and realities identified earlier are to be addressed.

It is interesting to note that the concerns of spouses, which ranked highly in the issues identified in Part One of the survey, ranked number ten in the list of potential solutions.

6. Approaches that will have the highest probability of success for attracting and retaining staff in the long term

Putting compensation aside, respondents were asked to rank strategies that have a longer-term perspective. The responses are presented in Table 5.6, *following*.

Table 5.5

Indicate the approaches that will have the highest *possibility* of success for attracting and retaining staff

Ranking	Scoring	Response
1	119	Competitive compensation packages
2	52	Partnerships to share specialized staff
3	45	Offer training, education in return for job commitment
4	43	Expand seasonal opportunities — work season extended
5	40	Create P/T and contract opportunities for retired staff
6	39	Cross-training of staff
7	33	Search for community fit rather than qualifications
8	19	Regional approaches to recruitment
9	16	Share hiring experiences among municipalities
10	13	Include spousal inducements in hiring package

Table 5.6

Indicate the approaches that will have the highest *probability* of success for attracting and retaining staff

Ranking	Scoring	Response
1	101	Promote local government in area schools, career fairs, post-secondary institutions
2	79	Improve visibility of all aspects of local government
3	57	Bring out-of-province workers into the workforce
4	51	Regional cooperation to provide regional services
5	31	Other long-term solutions
6	25	Province set up scholarships and bursaries

The longer-term strategies focus attention on the need to deal with the perceptions concerning the potential and “quality” of rural municipalities as employers. The top two rankings are image related and focus on the need for marketing.

7. Foreign Workers

Respondents were asked a series of questions concerning the desirability of attracting foreign workers to staff municipal positions.

In response to the question:

“Have you recruited staff outside the country?”

—over 90% of respondents indicated that they have not.

In response to the question:

“Are you in favour of hiring staff from outside the province?”

—88% said Yes, 6% said Yes, Conditionally.

In response to the question:

“Are you in favour of AAMDC developing a strategy to attract foreign workers?”

—73% said Yes, 21% said No.

8. Potential contributions of AAMDC for increasing the success of attracting and retaining staff

We asked respondents to rank a series of potential activities that AAMDC could become involved in that would contribute to rural municipalities’ success with labour force issues. The results are presented in Table 5.7, *following*.

The responses indicate a widespread interest in AAMDC taking on a services role with respect to labour force issues. The highest-ranked response is consistent with the strategy identified earlier with respect to improving the image of rural municipalities as a potential employer.

The relatively even distribution of scoring for the next five rankings indicates support for a variety of different centralized services that have the potential for supporting information exchange and the provision of education and training.

Table 5.7
Rank the potential contributions of AAMDC for increasing the success of attracting and retaining staff

Ranking	Scoring	Response
1	114	Work with educational institutions to create programs and interest
2	66	Provide a medium for posting of employment opportunities
3	60	Facilitate information sharing
4	59	Provide regional workshops on attraction/retention
5	53	Develop/manage inter-municipal mentorship programs
6	40	Work to accredit municipal areas of study and training
7	38	Contract for specialized services — retainer basis
8	21	Perform human resources coordination function

9. Potential contributions of Municipal Affairs and Housing for increasing the probability of success for attracting and retaining staff

Respondents were asked to rank a series of potential initiatives sponsored by Municipal Affairs and Housing. The results are presented in Table 5.8.

Table 5.8
Rank the potential contributions of MAH for increasing the probability of success for attracting and retaining staff

Ranking	Scoring	Response
1	113	Market municipal government
2	109	Expand internship program to include specific positions
3	63	Develop internship program for existing municipal employees
4	61	Provide confidential job search registry for potential candidates
5	45	Make available ex-government certifying requirements for municipal jobs
6	26	Actively solicit qualified foreign workers to come to rural Alberta

Again, the number one ranked response focused on raising the profile of rural municipalities. The next two highest-ranked contributions address the Municipal Internship Program (MIP) and support the notion of the MIP as a useful and valued contribution that should be expanded.

The remaining initiatives address a variety of thoughts including the potential for a job search registry, the solicitation of foreign workers on behalf of rural municipalities and the maintenance of cross-government position requirements that were documented as part of the research for this Strategy.

6. RECOMMENDATIONS

In the following sections of this chapter, we present our recommendations in support of workable solutions for rural municipalities.

The recommendations are grouped under a series of themes that have emerged from the Workable Solutions Survey, the examination of the requirements for education and training, and the analysis of the Municipal Internship Program. The recommendations are keyed to the three major stakeholder groups who participated in the development of the Workable Solutions for Rural Municipalities: rural municipalities, AAMDC and MAH.

1. LOOKING LOCALLY

Looking locally for staff emerges from the concept of hiring staff who have a fit with the community. The following recommendations focus on ways of expanding or identifying potential candidates from within the local community.

We recommend that rural municipalities:

- | | |
|-----|--|
| 1.1 | Focus attention on sourcing candidates from non-traditional areas such as retired workers, spouses and family of staff, under-employed residents and the like. |
|-----|--|

Municipalities have a potentially larger target population of candidates if they open the recruitment lens to include sources of labour that have not traditionally been the focus of recruitment efforts.

These under-exploited markets include:

- **Retired Municipal Workers** – it has been our experience that many former staff, in all positions of municipal employ, have expressed some desire to continue to work with their former employer on a contractual basis.
- **Spouses and family** – the spouses of existing staff who are considering entering or in many cases, re-entering, the workforce may not think of the municipality as a potential employer.
- **Under-employed residents** – while more difficult to identify this group of individuals, they may offer a significant benefit to the employer. Potential candidates in this category include individuals who are not currently in the workforce or those who are employed, but by virtue of investing in their future, have upgraded their skills or completed additional educational programs of study.

There are a number of challenges to employing this strategy that may require the municipality to be more flexible in the application of personnel policies and hiring practices. Retired workers, for example, may only be willing to work on a part-time basis and want to be hired as contractors not as employees (in many cases to avoid jeopardizing pension benefits). Should pension plan changes be made that overcome the problem of using final years instead of highest earning years, then a graduated retirement could be offered.

Action Steps

To be effective, this strategy requires the municipality to be proactive in identifying whether or not potential candidates exist in non-traditional areas. Several practices will make this identification process easier:

- **Planning for Retirement Counseling** – well before a staff member retires, municipalities should consider offering retirement counseling services that include (where appropriate) consideration of post-retirement employment. This practice helps the employee plan for retirement and raises the potential for continuing to work for the municipality under a different arrangement.
- **Spousal and Family Employment** – there are a number of activities that municipalities can employ to determine the potential of spousal employment. Initially, during the recruitment of any staff members, the municipality should ask candidates about the employment status of their spouses. This practice satisfies two objectives: one, to determine if spousal employment will be a deciding factor in the current recruitment process and two, to identify the potential of the spouse as an additional hire.

For existing staff, the municipality should consider enlisting their aid to dialogue with their spouses about the potential for becoming recruitment candidates. While this practice can create situations of undo advocacy or disappointment when employment does not result, the benefits of discovering skills and untapped talent outweigh the potential negatives.

- **Recent arrivals** – newly hired staff or transfers from other locations of local employers may also present opportunities for sourcing new staff from the families of these individuals. Maintaining a network with major employers in the region and

asking about the career aspirations of spouses and families may produce a “win-win” situation.

- **Under-employed residents** – to estimate the potential of this category will require the municipality to do some research into the socio-economic profile of the community. An initial step is to make use of the census data collected by Statistics Canada. Stats Can’s web site (www.statscan.ca) offers a service called Community Profiles which highlights population data about occupations, backgrounds, etc. that is useful in mapping the make-up of the region. With this information in hand, the municipality can determine if it is worthwhile to target the local community to find particular skill sets and to, for example, advertise for them.
- **Graduated retirement** – is a future, potential means of extending the careers of employees to work on a part-time basis to train, mentor and help out in vacation or peak times.
- **Aboriginal communities** – rural municipalities, in many cases, have an opportunity to work with Aboriginal communities to build relationships. These relationships have the potential to lead to attracting qualified candidates.

AAMDC is assisting with the publication of a document entitled, *Common Interests, Mutual Gains, Building Relations with Aboriginal People: A Primer for Local Government Officials in Alberta*. When published, this guide should be useful in developing an approach.

- **Other sources** – additional areas to look include researching the membership of volunteer organizations. In some cases, individuals with valued skill sets are volunteering their time without consideration of seeking employment. This may be by choice, but it may also be because they are unaware of the opportunities of employment.

1.2	Solicit the active participation of existing staff to act as recruiters for the municipality.
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Your existing staff can offer the best example of why it is desirable to become a municipal employee. People who enjoy the work that they do and the environment they work in can potentially send positive messages to their friends, their neighbours and the people they interact with on a daily basis, including their families.

For this practice to be effective, you must ensure that:

- **Your staff buys into the concept** – not all staff are comfortable with the idea of soliciting the interest of prospective employees. To overcome this reluctance, you need to provide guidance on how to introduce the topic of recruitment in various settings and how to “market” the municipality as a good place to work.
- **Staff are rewarded in some way for participating** – besides being able to actively influence who may potentially become a municipal employee, staff should be positively rewarded for their efforts. This may come in the form of cash bonuses for an actual hire or another valued benefit such as additional vacation time.

- **The messages are consistent and accurate** – the profile of municipal government that you want to portray should be articulated and documented. Staff should be part of the process to define what messages you send to the marketplace and they should feel that they are being asked to do something positive.
- **Your workforce is reasonably content** – this practice will not work if your workforce is unhappy. An unhappy workforce will not participate and if they do, they are likely sending negative messages rather than the ones you want.

This practice is designed to be a win-win-win strategy that provides suitable employment for someone looking for work, fills a void in the organization with a desirable skill set and rewards the employee who sourced the candidate in the first place.

Action Steps

We suggest the municipality develop an employee recruiter program that exhibits the following features:

Recruitment training for staff — using a trained marketing and business development individual, prepare a training program that provides exposure to basic techniques for:

- Broaching the topic of recruitment in social and business settings.
- Marketing the municipality in a positive light.
- Gauging potential.
- Getting to the next step.

The objective here is to make staff comfortable with the idea that they are proactively seeking out individuals who may potentially work for the municipality. This is not a natural process and one that must be learned if it is to be of any value.

Referral and follow-up – staff should not be out there recruiting without a contact for potential candidates to interface with. For municipalities that have human resources departments, they are the logical point of contact. Municipalities that do not have designated human resource staff should select an individual who will serve in this role.

The responsibilities here are to ensure that:

- Someone from the municipality follows-up with the individual.
- A record is kept of the contact and potentially a résumé is recorded.
- A job match is conducted (matching existing job opportunities with applicant qualifications).
- Periodic follow-up when an immediate job match does not occur.
- Credit is given to the referring staff member.

Participating in the hiring process – this practice provides both existing and potential staff the opportunity to meet and evaluate each other before a hiring decision is made. This practice would include being able to provide some input during the interview process.

Celebrating success – success should be rewarded and celebrated. In some organizations, an annual competition is held to see who can generate the largest number of referrals, the largest number of referrals that turn into job offers, etc. At the close of the competition, a staff party is organized and winners are announced along with the prizes they have won.

Link this practice with others – providing staff the opportunity and means to act as recruiters should be coupled with some direction about where to look for possible candidates. We have already discussed sourcing candidates from non-traditional areas and emphasized the opportunity to identify under-employed residents and spouses who are potential candidates.

1.3 Offer scholarships, bursaries and summer employment to local post-secondary students in return for future service as a municipal employee.
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As the Workable Solutions Survey indicated, one of the most significant obstacles rural municipalities face when it comes to recruitment is finding candidates with a fit to the community. One of the potential solutions to this dilemma is recruiting potential staff during their formative years of schooling. Obviously this is not a short-term solution, but it is one that offers significant long-term potential if it is pursued on a consistent and extended basis.

This type of inducement lends itself to a regional cooperation model where students from the local communities would participate in a regional program. The objective would be to have students return to the region.

For this practice to be effective, you must ensure that:

- **You are prepared to make a long-term commitment** – commitments such as this have to be viewed as contracts. That is, you are contracting with a individual for services in the future in return for payment today. This time delay may extend for years if the student enters an honours undergraduate program or graduate program in university.
- **The risks are identified and addressed in the contract** – there are risks on both sides; for example, the student may determine that their career aspirations are in a field totally unrelated to municipal needs or the municipality may find itself without a meaningful placement for the graduate. This puts the onus on the municipality to have a contingency plan in place or, at least, a means of addressing or mitigating the risks.
- **The program is fair and equitable** – the introduction of a program of this nature must include participation of the greater community to address perceptions of nepotism, prejudicial exclusions and the like.
- **The program is not viewed as an indentured service** – successful models of this form of contract emphasize the opportunities for learning rather than the paying back of an obligation. The program must characterize the employment by the municipality as the bonus to having all or part of your education paid for.

- **The program includes work experience** – to further cement the relationship between the student and the municipality it is often desirable to have the student return to the community and work with the municipality in some capacity. Preferably this would entail a broad exposure to the many facets of municipal employment. If the program of studies includes a co-op workterm or the program is an apprenticeship program, ensure the student performs this requirement in the local community.

This places a greater obligation on the municipality to create a program of training and orientation that goes beyond one day of new staff training.

This practice is again formulated to be a win-win situation in which the student is financially assisted to get both an education and a career, while the municipality has some certainty concerning potential future staff.

Action Steps

The municipality will require assistance in putting a program such as this together:

- Legal counsel will be required to draft the student agreement – there are legal considerations to be addressed:
 - To what extent is it desirable to bind both parties to the agreement — that is, what reasonable boundary conditions should be in place to terminate the agreement?
 - What can we reasonably expect the agreement to contain to compel the student to either fulfill their obligation or provide repayment?
 - What compels the municipality to provide employment and is there a fair means to avoid this obligation if circumstances dictate this is not the best course of action for the municipality to pursue?
- **The school system should be involved to help source and select candidates** – the municipality should develop some minimal set of criteria concerning the types of students who would be eligible for entering this program. The school board(s) should be enlisted to advertise the program within schools, select candidates and work with the municipality to interview students and make selections.

There are a number of objectives here:

- The municipality can take advantage of the opportunity to bring the “face” of municipal government into the schools.
- Interviewing students provides an opportunity for one-on-one contact with students who may not necessarily be continuing with their education and are looking for employment.
- The participation of the schools portrays the reality of un-biased sourcing and selection of students.

- The relationship between the municipality and the school system is strengthened and the potential for greater cooperation is enhanced.
- **Staff participation in the student's work experience** – staff will need to be involved in developing and delivering the contents of the work experience program. Municipalities should consider the work already done by Municipal Affairs and Housing with the Municipal Internship Program. Staff time and involvement is critical in creating not only the right image, but more importantly, the right environment to mentor and develop students.

1.4	Target recruitment efforts within the local community by reshaping positions and position requirements to fit the skills, capabilities and potential of available candidates.
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Municipal position descriptions and position requirements evolve over time as a result of changing needs and as a result of the skills and experience of the staff who occupy those positions. At times, this can lead to position requirements that mimic the credentials of the incumbent and position duties and responsibilities that reflect the latest re-balancing of the workload.

As a consequence, when the incumbent moves on to some other position, employer or stage of life, the municipality may find itself having difficulty trying to replace a unique set of circumstances. Potentially this can be overcome by again re-shaping the job duties and responsibilities to more closely fit the profile of available candidates.

For this practice to provide meaningful results, you must ensure that:

- **You have a sense of the available pool of talent** – this knowledge comes from recent recruitment efforts, from information provided by individuals seeking work and from other practices identified in this strategy (sourcing candidates from non-traditional areas, using staff as recruiters, etc.).
- **You understand the priorities of the new labour market** – as the demographics of the labour market change, so do their priorities. How positions are structured is an important consideration if the new priority is, for example, no overtime or no weekends.
- **There are material changes that could and should be made to re-shaping positions and position requirements** – this activity should be conducted in concert with the Re-Examination of Position Qualifications (strategies 6.1 – 6.5) strategy contained in this document.
- **You access the knowledge and experience of your staff** – the reshaping of positions will have a domino effect on existing staff. What you must ensure is that you do not create an imbalance in workloads to accommodate the hiring of a new staff member.
- This practice is targeted at making the best and highest use of your existing staff as well as increasing the probability of attracting and retaining new staff. This is not change for change sake, rather it is making adjustments to the distribution of duties and responsibilities to facilitate a better fit all around.

Action Steps

The municipality should consider undertaking this practice with a logically developed action plan:

Assess opportunities to re-shape positions – several questions should be considered before initiating this exercise:

- **When was the last time a major organizational review was conducted?** If you have recently, in the last 2-3 years, undergone a major review of the municipal organization then a major review may be unnecessary. However, if you have not re-organized in the last ten years, then it is likely that you are due for one and this practice should be conducted in concert with that initiative.
- **Are the benefits of doing this likely to outweigh the disruption caused by re-alignment of staff?** Change is not likely to be welcomed unless the benefits are real and observable by staff. The objective of re-alignment is two-fold: balance the workload of existing staff while, at the same time, fit position descriptions with the observed capabilities of potential candidates. If only the latter objective is attainable then there is reason to continue.
- **Are there material differences that we can achieve?** Assessing position requirements will lead to classifying requirements into two categories: mandatory and desirable. Mandatory requirements are typically regulatory requirements imposed by other levels of government. Desirable requirements are imposed locally (skills, experience, education, etc.), and can be reset to reflect current, local realities.
- If these requirements can be realistically re-thought and applied, then material differences are a possibility and this practice can be applied.
- **Are the available skill sets a good potential fit and/or can they be up-graded to meet your needs?** Your assessment of the available skills should take into account not only what capabilities are demonstrated by candidates, but also the investment that will be required to raise them to meet your needs.

There will always be risks when attempting to assess the potential of candidates to grow into a position:

- **The candidate may not want to or can not grow** – learning is an investment on the part of the candidate and not all individuals share the same level of enthusiasm or capacity to learn.
- **The cost may be too high** – in situations where formal training is required, the cost to train the individual may be too high for either the municipality or the individual.
- **There is no one around to mentor** – growing individuals into positions whether they are apprentice mechanics or planning assistants requires the presence of someone who provides direction, training and support. In the absence of a mentor, it is unlikely that growth will take place at a pace that is satisfactory to the individual or the municipality.

If the risks appear minimal, or can be mitigated by using other practices such as using retired municipal workers to mentor the individual, then the potential for success increases.

1.5 Be more flexible in setting working conditions to attract local staff.

The Workable Solutions Survey identified a series of working conditions of rural municipalities that make recruitment difficult. These factors fall into two categories: those factors over which the municipality has no control, such as distance from major tertiary medical facilities, and those factors over which the municipality has some ability to influence, such as full-time versus part-time employment.

The perception of recruitment factors are not the same for all potential candidates. As the survey has shown, living in a smaller-sized community, for example, is viewed as either a positive or a negative depending on the personal outlook of the candidate. For controllable, negative recruitment factors, the municipality has the potential to overcome these factors through the re-thinking of existing conditions of employment.

The underlying assumptions of this practice are that you are:

- **Prepared to abandon personnel practices that have worked in the past** – maintaining standards for hours of work, dress codes, places of work, etc. has been a time honoured practice and one that has served municipalities well in the past. Letting go of these standards is difficult and requires an open mind set.
- **Aware of what the negative recruitment factors are** – changing working conditions should be a process of adapting to the changing needs of the workforce you are attempting to attract. This implies you have some awareness of what those requirements are.
- **Prepared to deal with the consequences with existing staff** – introducing flexibility into working conditions to accommodate new hires can be viewed as both positive and negative by existing staff.

Typically the best starting point for this type of strategy is with existing staff. The last thing you want to do is make a number of changes to existing working conditions without consultation. A recent example of a major Alberta employer is a good case in point: it was determined, without consultation with staff, that changing the work week to four ten-hour days from five eight-hour days would be a positive move. Staff reaction was negative to the fact that there was no consultation even though the majority liked the concept.

Action Steps

The municipality should consider undertaking this practice by following the steps outlined below:

- **Conduct a review of current working conditions with staff** – the object of this review should be to identify opportunities for change that existing staff believe would make the municipality a better place to work. While the municipality must manage staff expectations through this process, there must also be a commitment to follow through.

- **Examine the results of recent and current recruitment efforts** – attempt to determine what negative recruitment factors were identified through explicit needs expressed by the candidate that could not be met by the municipality, for example:
 - Part-time work rather than required full-time work.
 - Working out of the home rather than at the municipal office.
 - Flexible hours rather than required standard hours per day.
- **Determine what change in practice will lead to positive results** - the likelihood is that the factors you are attempting to overcome are not unique and that solutions are readily available, for example:
 - **Job sharing** – hiring two or more part-time individuals to cover what has traditionally been a single full-time position.
 - **Home connection networked to the municipal office** – in today’s networked world, the requirement for all staff to be physically located in the municipal office is a matter of preference rather than necessity.
 - **Re-focusing on getting work done rather than when** – for certain municipal positions there is an opportunity to allow staff to work in what traditionally would be considered off-hours.
- **Be prepared to work with existing staff to transition into the new working conditions** – this implies that the flexibility in working conditions will apply equally to existing staff and to new hires. It is likely that some staff will want to adjust their current environment to take advantage of the changes; however, there will also be a tendency to remain with the status quo.

2. LOOKING IN-HOUSE

Looking in-house refers to the practices of enhancing the capabilities and capacities of existing staff to take on new challenges.

We recommend that rural municipalities:

- 2.1 Support development and participate in a Municipal Internship Program-type program designed for existing municipal staff.

One of the negative retention factors identified in the Workable Solutions Survey focused on the lack of opportunity for existing staff to gain a broader base of knowledge and experience in the municipal arena without leaving their current employment.

For rural municipalities this creates several potentially negative results:

1. The staff member leaves, creating the need to recruit and potentially train a new staff member.

2. The staff member stays, but is dissatisfied and does not grow.
3. The staff member initiates some level of education or training on their own, potentially at the expense of the municipality and then leaves once they have completed the program.

What appears to make the most sense is to have a program where qualified candidates have the opportunity to become exposed to all facets of municipal responsibility, combined with course material and mentorship.

The existing Municipal Internship Program offers a reasonable model upon which to base this program. Municipal Affairs and Housing is currently considering the development of such a program and it is important that municipalities support the development of this initiative and participate once it has been introduced.

2.2 Facilitate access and the opportunity to take education and training programs that address difficult-to-acquire skill sets and that successful completion of these programs be rewarded.

Many municipalities provide for the support of staff who wish to upgrade their skills or level of education. This practice is positive, however, it potentially falls short of proactively addressing the qualifications and skill level shortage being experienced by the municipality.

Municipalities need to build on their existing policies to create a situation that rewards staff for successfully completing programs that lead to the staffing of targeted positions.

For this practice to be successful, municipalities need to:

- **Identify current and future problem positions** – this activity may come as a by-product of preparing a succession plan, or it may simply be derived from an assessment of current problem staffing areas and an evaluation of projected retirements within the staff complement.
- **Determine the minimum qualifications for this position** – activity should be conducted in concert with the Re-Examination of Position Qualifications (strategies 6.1 to 6.5) strategy contained in this document.
- **Determine the most likely provider(s) of the desired skills** – using reference sources, including the companion document to this strategy, identify the most accessible options.
- **Identify potential candidates** – determine if internal candidates exist.
- **Be prepared to offer incentives** – encouraging staff to upgrade or enhance their skills may require that the municipality provide some “carrot” to overcome the reluctance of staff.

The object of this practice is to not leave potential, internal candidate selection up to chance. You need to clearly determine what qualifications are required and that an accessible provider is available to deliver the education and training needed.

Action Steps

The municipality should consider undertaking this practice with a logically developed plan of action:

- **Determine the minimum set of qualifications first** – the starting point after having determined which positions are targeted, is to ensure that qualification requirements are accurate:
 - **Reference the companion strategies for re-examination of position qualifications** – the practices identified here provide a practical approach to determining minimum levels of qualification, including education and training.
- **Finding internal candidates** – municipalities typically have internal job postings that are a photocopy of the ad placed in the local newspaper. This approach relies upon the ability of existing staff to objectively assess their own capabilities and measure them against what is portrayed in the job posting. This is not necessarily the most reliable process.

The municipality should enhance this process by:

- **Requiring management staff to select internal candidates** – while this practice may be subject to undue advocacy or protectionism, it is better than relying solely on individual staff members to make self-determinations.
- **Maintaining up-to-date personnel records** – personnel records should contain information concerning the credentials of existing staff at the time they were hired. Up-to-date records should also indicate any additional education or training the staff member has completed or is in the process of completing.
- **Being prepared to support education and training un-related to current staffing needs** – individuals may take it upon themselves to seek training and education in areas related to difficult to acquire skill sets. This practice needs to be encouraged, or at least supported, to the same level of support as currently targeted skills.
- **Measuring the gap** – knowing the target candidate(s) and their qualifications is the next step in measuring the gap. From this assessment, the municipality can determine if the gap is too wide and an internal candidate is not appropriate or that there is a potential to grow staff into the position.
- **Proactively determining a course of action** – the municipality is now in the position of presenting an opportunity to an existing staff member(s). When discussing the opportunity with the individual you are in a position to talk knowledgeably about the qualification gap and how that gap can be addressed through a combination of education and training, mentoring and experience.

The staff member will have many questions about:

- Is there financial support.
- Can I get time off to complete the program.
- How long will this take.
- How is the program delivered.
- Where do I go.

Charting out a timeline with milestones identified creates an action plan that is simple to follow and easy to understand. It sets a target and a baseline upon which to measure performance and progress.

- **Measure progress and performance** – your investment in staff is very similar to investing in any project. You need to measure progress and performance and to take corrective action along the way, as necessary.
- **Reward success** – assuming a staff member successfully completes a program of studies that leads to attainment of the qualifications necessary for the new position, this accomplishment should be rewarded beyond reimbursement for the monies invested to complete the program.

2.3	Develop career paths for each employee in conjunction with a succession plan for the municipality.
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One of the reasons identified in the survey that staff are difficult to retain is the belief that they have reached an impasse in their career. That is, they see no future because they either lack the skills, education or training to move forward or that there will be no job opening up to take advantage of the qualifications that they do have.

Municipalities can overcome this situation by working with their staff members to chart a career course that takes into account the aspirations of individuals, the needs of the municipality and the potential for enhancing staff qualifications to satisfy both.

For this practice to be successful municipalities need to:

- **Conduct annual performance appraisals**– this activity involves meeting with individual staff members to set goals and targets for the coming year and measuring current performance against last year's goals and targets.
- **Provide individual career counseling for staff** – during the course of the performance review a discussion should take place about what potential career moves the staff member should consider, if any.
- Not all staff members want to pursue new and different job responsibilities; but the performance review provides the opportunity for the staff member and the municipality to explore what career options are open and what course of action will be appropriate over the coming year.

- **Jointly develop a course of action** – career paths are not automatically pre-programmed. The path will vary with the individual's strengths and weaknesses, capabilities and capacities.

Action Steps

The municipality should consider undertaking this practice with a logically developed plan of action:

- **Set goals and targets with the staff member** – assuming the staff member has decided what career course they wish to pursue:
 - **Determine the steps necessary to get there** – identify the education, training and experience that will be necessary for the staff member to acquire.
 - **Determine the most likely provider(s) of the desired skills** – using reference sources, including the companion document to this strategy, identify the most accessible options.
 - **Estimate the amount of time it will take to complete the steps** – work with the staff member to assess their capacity to take training and educational programs and to be part of some mentoring program to gain experience.
 - **Prepare an individual plan** – create a schedule for each staff member that highlights the milestone achievement of each of the steps.
- **Measure progress** – review the plans with staff members on a regular basis to ensure progress and performance are taking place.
- **Be prepared to offer incentives** – encouraging staff to upgrade or enhance their skills may require that the municipality provide some reward to overcome the reluctance of staff.

The object of this practice is to proactively address the needs of staff and to recognize what is required to move forward with a municipal career. This practice will in many cases overcome the individual's belief that they have reached the top of the ladder and that they have no place to go within the municipality.

The practice of developing career paths for individual staff members should be conducted in concert with the development of a succession plan for the municipality.

2.4	Develop a municipal succession plan that addresses how key positions will be staffed into the future.
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Planning for the future involves planning for how resources will be sourced to address critical needs. Human resources, like all other scarce resources, require thought and planning if municipalities are to avoid shortages and remain viable. One of the most useful ways of addressing future human resource needs is the preparation of a succession plan.

Succession plans can take many forms and can be developed to varying levels of detail depending upon the resources available to prepare and more importantly, maintain, the plan.

The key attributes of a succession plan are:

- **An assessment of needs into the future** – succession plans are not about today's human resource needs, rather they focus on the future and the needs that are likely to surface for a variety of reasons: retirement, changing economic conditions, societal trends, etc.
- **Targeting positions and position requirements** – the assessment of needs should lead to the identification of key positions to plan for. Knowing the position requirements into the future becomes the second key attribute of the plan.
- **Defined career paths** – career paths are the combined efforts of individual staff members and the municipality to document how individuals will grow to satisfy individual needs as well as municipal requirements.
- **Replacement charting and people tracking** – updated progress and performance tracking of how well successors are progressing.

Action Steps

The municipality should consider undertaking this practice with a human resources policy and process that provides for:

- **Conducting strategic planning** – municipalities need, on a regular basis, to conduct strategic planning that addresses the strengths and weaknesses of the organization, as well as the opportunities and threats that will materially impact on the operation of the municipality (SWOT analysis).

This would include looking at the political, legal and socio-economic trends to predict what is likely to continue, evolve or disappear in the longer term. These predictions, along with the SWOT analysis, provide a broad-brush picture of future staffing needs.

- **Assessing the current staff complement** – the assessment of the current staff provides the municipality with two perspectives:
 - **Current staff competency gaps** – these are competency areas where the municipality has chronic problems attracting and retaining staff.
 - **Near- and medium-term retirements** – a proactive look at whom in the organization is likely to retire in the next one-three years.
- **Defining key competencies** – is different than describing position requirements. Competencies focus on specific skill sets, such as financial planning or engineering contract management, as opposed to, for example, a requirement for a high school diploma or five years experience.

Key competencies address the attributes that are required to perform various municipal functions and may include specific certifications such as water plant

operation or professional accreditation such as a certified management accountant (CMA).

- **Linking career paths with future needs and key competencies** – the succession plan involves matching the municipalities future needs for key competencies with the individual career paths developed for staff members. This linkage should be documented to demonstrate how the municipality plans to fulfill its staff needs and to provide a baseline for tracking success.
- **Charting replacement and people tracking** – to be effective, the succession plan requires ongoing management. This involves monitoring the education and training progress of individuals compared to the identified key competencies. The term “charting replacement” refers to the practice of identifying individual staff members for positions that their individual career paths will lead them to. For example, you may have identified through staff assessments and career path development that a staff member who is currently a recreation program coordinator has the capacity and the desire to become a director of administration.

On your succession plan chart you have identified the director of administration position and have linked the name of the recreation coordinator to that position. You have identified the key competencies that are required for the position and you have determined what employee development must take place. Measuring the employee’s progress towards acquiring the key competencies fulfills the need for people tracking.

This is likely only practical for what the municipality considers to be key positions. That is, tracking would follow difficult-to-recruit positions and senior level staff.

The objective of this policy and process is to determine how the competency needs of the municipality will be met in the future. Equally important is the ability to demonstrate to employees that there is a future for them within the municipality. This latter point is an important contribution for initially attracting staff and subsequently retaining them.

The policy and process of developing and maintaining a succession plan should be conducted in concert with the development of career paths for individual staff members.

2.5	Develop a strategy to retain the services of retiring employees.
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The Workable Solutions Survey indicated that a number of rural municipalities favour the practice of retaining the services of retiring employees.

This practice offers many obvious benefits and presents an opportunity to not only address workload issues, but also to create mentorship situations for development of key competencies. In many cases this practice is a form of transitional retirement where the employee works progressively fewer hours over a period of months or years.

Action Steps

For this practice to be successful, municipalities need to:

- **Recognize the needs of the retiree** – retirees often have differing reasons for maintaining their relationship with the municipality. For some there is a monetary need, for many however, there is a desire to go through a period of transition from full-time employment to full-time retirement, while still others may be looking for an opportunity to teach and share their knowledge.

Whatever the reason, municipalities should consider the needs of the retiree before assuming that they will respond favourably to the offer of an ongoing relationship.

- **Develop a standard practice for service contracting** – it is likely that due to pension issues, retirees will not want to stay on as employees. For this reason, municipalities should develop a standard practice for the contracting of former employees. Certain employers, including the provincial government, have policies that in some cases prevent the hiring of retired workers for a period of time after they retire. It is up to individual municipalities to determine whether or not this practice is desirable.

The standard practice should spell out the specific services that the municipality wishes the retiree to provide and should provide for contingency situations such as full-time work during peak periods or for vacation coverage.

- **Begin discussions early** – in situations where new and/or future retirees have key competencies that will be difficult to replace, it is important for the municipality to begin the dialogue with the retiree well in advance of their departure. Two or three years prior to retirement is not unreasonable, especially for senior staff members or those with specialized skills that will be difficult to recruit.
- **Offer assisted retirement planning** – one of the ways of practically assisting retirees and helping the municipality to potentially access their services is to offer assisted retirement planning as an employee benefit.
- **Be careful how you proceed** – it should be noted that the offer of assisted retirement planning, coupled with beginning the dialogue early, can create the wrong impression with some staff members. The perception that you are trying to “get rid of them” can destroy years of trust and close the door on a future relationship.

Retirees as a potential source of competencies should not be limited to your own staff. There are individuals with specialized skills who are looking for new challenges and new venues to provide their expertise. The challenge for municipalities is to be aware of these individuals and how to tap into their capabilities.

2.6	Consider expanding the work season to enhance the probability of retaining seasonal employees.
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The issues of recruitment and retention are as problematic for seasonal staff as they are for full-time staff for many rural municipalities.

To overcome this issue, respondees to the Workable Solutions Survey suggested that the municipalities consider various means to expand the work season.

Action Steps

For this practice to be successful, municipalities should consider:

- **Scheduling projects in the winter months** – seasonal workers are, by definition, typically workers who only work for certain months of the year with the municipality. One way to avoid the problem of having to recruit seasonal staff is to treat them as full-time staff and schedule projects throughout the year rather than only in the summer months. This obviously requires some creativity to ensure that there is value in the work being done and that workers also find value in the work they are doing.

This expansion of the work season also provides an opportunity to offer benefits to seasonal workers that might not be readily available on a seasonal basis.

- **Developing relationships with employers who need off-season workers** – while this practice is not common, some rural municipalities have developed a working relationship with resource companies to share seasonal workers. For this practice to be successful the two employers (one being the municipality) have to have opposing schedules of need for the seasonal workers, otherwise the relationship breaks down.

In some cases, the municipality takes on the responsibility for full-time employment of the workers and “rents-out” the seasonal staff for a period of months in the off-season.

2.7	Consider expanding opportunities for seasonal workers by offers of full-time employment supplemented by education and training.
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Seasonal workers are not always viewed in the same light as existing staff members when it comes to assessing their potential as candidates for position openings.

Looking in-house to source competencies and to identify potential candidates for full-time municipal positions should be expanded to include seasonal workers.

Action Steps

For this practice to be successful, municipalities should consider:

- **Having seasonal worker supervisors complete worker assessments** – supervisors have the opportunity to work with individuals on a one-on-one basis and are in the best position to evaluate the strengths and weaknesses of the people they supervise.

The assessments are not performance reviews, they are evaluations of the workers to determine what competencies they possess and what capabilities do they have the potential to possess. This process is similar to the career path practice for regular staff members in that the objective is to identify “target” individuals who have the capacity to benefit from staff development focused on key competencies.

- **Including seasonal workers in staff information sessions** – this approach is often impractical if seasonal workers are simply invited to staff meetings. Realistically, sessions specifically tailored to seasonal workers which highlight career opportunities

and in which the sessions are conducted at a time and place more suitable for them, is likely to be more successful.

3. RESOURCE SHARING AND ALTERNATE SERVICE DELIVERY

We recommend that rural municipalities:

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| 3.1. Enter into a formalized and systematic examination of regional service delivery with neighbouring municipalities. |
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The results of the Workable Solutions Survey indicate that all rural municipalities participate to some extent in regional service delivery. The Survey also indicates that the potential for doing more in this area is significant. We see this strategy as being a material and viable means of addressing the ongoing inability to recruit and retain skilled resources by individual municipalities.

The benefits of regional service delivery have been discussed and demonstrated by many well-documented examples and include the following:

1. **Cost avoidance** – services which require large capital outlays, for example, waste water treatment plants, may be too costly for individual municipalities to build and operate on their own.
2. **Environmental considerations** – not all municipalities have access to environmentally-sound sites or facilities, for example, solid waste treatment centres.
3. **Level of service** – individually, some services such as 911 could be operated by individual municipalities, but a higher level of service can be provided by performing this activity on a regional basis.
4. **Scarcity of skilled resources** – collective service delivery using dedicated individuals with scarce skill sets offers a high probability of attracting and retaining these skill sets.

In our experience, the success of regional service ventures is directly tied to the crisis level faced by the participating municipalities. While there may be many good reasons for implementing regional service models, the fact that a significant labour shortage exists should be reason enough to consider regional delivery as a viable alternative.

To optimize how municipalities go about the task of examining the potential of this strategy requires a formalized initiative that proceeds through a series of pre-determined stages:

1. Examining the potential benefits of regional service delivery

Leadership is required to start the dialogue towards partnership. It is incumbent upon each municipality to come together with their neighbouring municipalities to agree to work together to initially explore the desirability and feasibility of regional service delivery.

2. Setting vision, mission and principles

Consensus is required on what the partnership sees as the future, how that future will be achieved and what important considerations will be applied along the way.

3. Evaluating Municipal Services

This is a systematic examination of all municipal services and a determination of which services have the potential to support the vision and mission.

4. Implementing

Implementation involves determination of the structure and processes that will be used to make the partnership operational.

A sample project charter that provides more information and detail about the process for carrying out this initiative is included in Appendix C.

The success or failure of this initiative is largely dependent on the ability of municipal councils to think and act regionally, recognizing that they will be held accountable locally.

3.2 Work with neighbouring municipalities to establish mentoring/training programs where an appropriately skilled resource is available to provide training.

To some extent, all individuals who are learning new skills in a job will benefit from training that is augmented by mentorship. Some jobs, where the consequences of performing the job improperly result in health and safety issues, require mentorship to avoid disastrous results. Rural municipalities will sometimes find themselves in situations where they have difficulty attracting an experienced individual (e.g., heavy equipment operator) and do not have anyone capable of either training or mentoring an inexperienced recruit.

To compensate for this gap, rural municipalities should consider entering a regional partnership to provide training and mentorship for scarce competencies that one or more of the regional participants is capable of addressing. The concept is predicated on the availability of a skilled resource being available to provide both training and mentorship or mentorship alone if training is more easily addressed elsewhere.

This type of program could be used to address competencies in a variety of different functional areas, from planning and assessment to grader operation and heavy duty mechanical repair. The questions of location, who travels to whom for training and mentorship, will be driven by local conditions and the practicality and logistics of delivery.

Action Steps

For this type of program to be effective a number of prerequisites need to be in place:

- 1. Willingness to cooperate** – municipalities that have difficulty cooperating on any front will find this initiative particularly difficult to put into practice. Even a fee-for-service is likely not going to work since the provision of mentorship for jobs such as grader operator causes the provider to be unproductive as a worker. These are not situations that can be planned at the last minute.

2. **Availability of an experienced teacher/mentor** – not all experienced individuals are good teachers/mentors and not all individuals want to be on the sidelines coaching when they could be performing their job. Teaching and mentoring require skills beyond the actual performance of job duties.
3. **Spare capacity** – most organizations understand the concept of spare capacity, that is, you require capacity in excess of your current needs. Figures vary, but some benchmarks suggest that at any one time only 80 per cent of your total workforce will be productive doing the jobs you have them assigned to. The remaining 20 per cent will be involved in training, on sick leave, taking holidays, doing someone else's job, etc. Spare capacity is the 10 per cent of staff that makes up the shortfall for the 20 per cent. These may be staff with non-specific job titles or non-specific job responsibilities that are difficult for rural municipalities to justify on the basis that they might be needed.
4. **An agreement that is equitable** – sharing agreements of this nature can not be long-term, one-way agreements where one or two municipalities are the sole providers. Even fee-for-service agreements will not work in the long term because the benefit to the provider is not in proportion to the disruption of training another municipality's staff.

Equity in this situation is the provision of a similar service for a different functional area or the provision of an environment where one municipality can install their staff member and provide their own mentorship in the second municipality's location.

These types of arrangements have been working informally in rural municipalities for many years and typically have succeeded because of the goodwill and trust that exists among the supervisors, managers and/or foremen who have helped each other out in the past.

3.3. Consider working with neighbouring municipalities to acquire scarce resources that would be shared among the participating municipalities.

Many rural municipalities find it necessary to require one staff member to assume multi-functional responsibilities for which multiple, single-function staff members would be under-employed. This practice complicates the recruitment process and increases risk for the municipality should the staff member leave. The situation is further exacerbated when one of the competencies happens to be an in-demand skill set, such as planning.

Respondents to the Workable Solutions Survey have indicated that one approach to solve this dilemma is to work cooperatively with neighbouring municipalities to acquire a single resource who will provide services to two or more municipalities. Variations of this approach include establishing a "centre of excellence" within one municipality and an agreement to provide services to the partner members of the agreement.

As with other cooperative ventures this approach relies upon the goodwill of the participants and anticipates that the arrangement will not be terminated without agreement.

Action Steps

For this type of program to be effective a number of prerequisites need to be in place:

1. **Willingness to cooperate** – municipalities that have difficulty cooperating on any front will find this initiative particularly difficult to put into practice. Even fee-for-service is likely not going to work since the provision of mentorship for jobs such as grader operator cause the provider to be un-productive as a worker. These are not situations that can be planned at the last minute.
2. **Agreement on where the resource will be based** – while the resource will be shared, the reality is that the individual will likely become an employee of one of the municipalities and, depending upon the type of work, will rotate their place of work among the various participants. For practical reasons, the homebase will likely provide direction to the resource and be responsible for ensuring that the individual is properly managed, trained and supported.
3. **Agreement on how the resource will be shared** – the unfortunate outcome that can be predicted is the perception by one or more of the participants that they are not receiving their fair share of the service. To avoid this circumstance it is best to spell out in the agreement how sharing will take place, using quantifiable measures of performance (for example, one day a week in municipality X).
4. **Agreement on how the resource will be funded** – typically funding follows sharing. That is, the proportion of usage is equal to the proportion of funding. Regardless of the formula, it should be spelled out in advance and codified in the agreement. What should also be spelled out are the cost components that make up the amount to be funded. Salary and benefit costs are the most obvious, but they are not the only direct cost involved in having a staff member who is shared: travel expenses, supervision, education and training, equipment, etc., are all costs associated with acquiring and maintaining a competent resource.
5. **A dispute resolution mechanism** – while disputes are not inevitable, there should be some process in place that will lead to an equitable solution to any disagreement.

These types of arrangements are different from the one described in the previous recommendation in that service delivery is directly based on a cooperative agreement. Helping one another to train and mentor staff and sharing a resource to deliver a service are significant first steps towards regional service delivery.

3.4 Consider the potential for non-employment solutions for difficult-to-recruit or retain competencies.
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Contracting out to acquire service delivery capacity is not a new concept for rural municipalities. For some, major programs such as road maintenance have been contracted out in the belief that the private sector is better positioned to deliver the service and/or the municipality does not want to maintain the staff resources necessary to achieve the service levels required by their residents. For others, contracting out appears to be a practice that is problematic to manage and to control.

Regardless of philosophy, contracting out is a potential solution for difficult-to-recruit and retain competencies. The research conducted as background to this strategy indicated that virtually every skill set required by rural municipalities was available for hire in the marketplace. The inclusion of this solution here is not an endorsement of contracting out as a general practice; it is

an option to be explored when conditions dictate that an alternate course of action to employment is required.

Action Steps

For this practice to be a viable option certain key factors need to be addressed:

1. **The municipality is prepared to engage in alternate service delivery (ASD)** – for some this is a non-issue and requires no further consideration. For others, there are three stakeholder groups who may have a position that requires attention:
 - ◆ **The public** – depending on the nature of the competencies to be sourced from the marketplace, the public reaction is likely to range from apathy to rapt attention. Typically, services such as road maintenance are significant attention-getters because the service is high profile and local resources see a potential for participating. Services such as preparing area structure plans, on the other hand, receive far less attention from the public.
 - ◆ **Council** – support from council, either through active endorsement of ASD or passive non-involvement, is important especially if the other two stakeholders are volatile.
 - ◆ **Existing staff** – staff have a stake in ASD. How the municipality proceeds should be based on a knowledgeable assessment of how staff will be impacted, if at all, and how staff will react, if at all.
2. **Ensure viable, alternative sources exist** – in a super-heated economy this becomes a significant factor for municipalities to consider. We are familiar with a number of situations where contracted-out services had to be brought back in-house due to the unavailability of outside resources to perform the work.
3. **Prepare and measure quantifiable, value-for-money performance criteria** – it is important to have pre-determined performance evaluation criteria established. Performance targets are important tools for evaluating progress and performance of all staff, but they are even more important to have in place for contracted-out positions.

The potential exists for situations to reverse themselves and the municipality should regularly evaluate the feasibility of taking the contracted service back in-house.

Contracted-out services are a viable option and the decision to move forward in this direction should be performed using a fact-based evaluation of the alternatives.

4. RAISING THE PROFILE OF RURAL MUNICIPALITIES

Raising the profile of rural municipalities will help the recruitment process by projecting the image of it as a good place to work. Practices and initiatives in this section are typically focused on long-term results.

We recommend that rural municipalities:

4.1 Commit to a proactive and persistent participation in local schools' career day programs.

For most school-age children a career in local government is likely not a priority or even a consideration beyond the high profile professions of protective and emergency services.

Awareness is a key consideration when young people begin the process of considering what career they want to pursue. Rural municipalities need to raise the level of awareness of students by actively participating in school-sponsored events that provide an opportunity to showcase the broad base of career choices available within local government.

Research indicates that children begin to form opinions about a choice of careers at the Grade 6 level and for this reason municipalities need to begin the process of educating students at this level. Grade 6 is also when students study local government as part of the social studies curriculum.

The career day programs are focused on Grade 11 students and probably offer the most significant opportunity to showcase local government services and employment.

For this practice to be successful, municipalities should consider:

- **Defining a functional responsibility for school liaison** – for an awareness program to be successful it must be a recognized responsibility within the administration of the municipality.
- **Preparing a program for school career day participation** – preparation for participating in school events should not be a last minute consideration about what the municipality will do and how they will do it. The program should include the use of multi-media presentations and attractive materials that will appeal to students at the various target ages.
- **Selecting participants from various departments** – critical to the success of any communication is selecting the right people to deliver the message. Part of the message is the broad scope of opportunity within local government and for this reason there should be broad-based representation available to the students.
- **Creating follow-up opportunities** – it is one thing to talk to students in their schools about working for a municipality, it is quite a different matter to show them what goes on inside local government. Creating opportunities to bring students into the workplace puts a whole new perspective on what career options are open to them
- **Offering inducements** – at the stage when students are preparing to further their education and training, municipalities have the opportunity to provide inducements to make local government a career choice.

School career day participation is not a trivial event and presents a captive opportunity for municipalities to communicate directly with students about career options to realize their potential.

Action Steps

To commit to a viable course of action for the participation in schools, municipalities need to:

- **Clearly define what the municipality wants to achieve** – the primary objective in participating in career day activities is to raise the level of awareness about the career options available through local government.

At the high school level you may also be attempting to recruit students who are either not considering post-secondary schooling or who are postponing the continuation of their education in favour of entering the workforce.

- **Assign responsibility for liaising with schools** – the responsibility for coordinating the municipality's activities with schools should fall within the duties of someone who is responsible for communications and/or human resources. The skill sets required include the ability to work with school officials, students and municipal co-workers. The individual must be persuasive in dealing with co-workers to ensure that the right individuals are presented during interactions with students.
- **Prepare appropriate materials** – since there are potentially several objectives and multiple age groups that you are attempting to appeal to, there will be a variety of different materials that will be required.

Municipal Affairs and Housing has developed student-oriented materials that are available for use by municipalities. This material should be reviewed and supplemented by municipality-specific details that reference, for example, the work experiences of the staff representatives that will be talking to students.

- **Select appropriate representatives** – key to this process is selecting individuals who want to participate and who have the ability to communicate with younger age groups. This group should include both genders and be representative of the various services and functions performed by local government.
- **Encourage school visits to the workplace** – reinforcement of the awareness messages requires there to be follow-up opportunities to see and visit with municipal staff at their place of work. Part of the school program should be to have the school visits planned and programmed based on the age groups and tied into the materials they were given during the presentations in the schools.

It is also appropriate to have the school visits coincide with council meetings and have the students witness the role of elected officials, especially for Grade 6 classes.

- **Where appropriate, make students aware of any support programs** – if the municipality has entered into the practice of providing financial support for education in return for a job commitment, then this inducement should be advertised and promoted during exchanges between students and the municipality.

Raising the profile of the municipality with the student population is a long-term commitment that requires planning and persistent execution if it is to produce material results.

4.2	Include recruitment of municipal workers in all promotional activities related to economic development and tourism.
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The investment in marketing tools to promote economic development and tourism provide an opportunity to include recruitment of municipal workers.

The linkages between economic development and tourism and the recruitment of municipal workers are not necessarily obvious, however, there are situations where industries are researching regions to locate a business, branch or plant and also researching the potential for finding prospective employment for spouses. Active recruitment implies a growing and viable economy which supports the economic development thrust of the promotion, while, at the same time, increases the potential for sourcing additional local resources.

Action Steps

For this practice to be successful, municipalities should consider:

- **Making a conscious decision to include municipal recruitment as an arm of economic development promotional activities** – for many rural municipalities, economic development activities are a regional initiative. The decision to include municipal recruitment will likely be a joint decision that has positive implications for all participants.
- **Establish a recruitment function** – many rural municipalities are not equipped to recruit. That is, there is no one who has the skills and knowledge to promote working in the municipality.
- **Having a prepared response for any enquires** – promotional materials are typically geared towards establishing an initial contact. Similarly, for recruitment efforts the first opportunity for contact is crucial for creating the right impression and facilitating an opportunity to make further contact.
- **Provide linkages to web pages** – attractive and appealing job postings that are accessible on the municipality's web page will be a necessary addition if this facility does not currently exist. Promotional materials typically make reference to additional sources of information and web pages are a given.

The message and the media used to present the message should reflect the professionalism and the quality standards of the municipality; that is, raising the profile of the municipality while at the same time promoting tourism, economic development and municipal employment will only be persuasive if the presentation is consistent and of high quality.

4.3 Develop or enhance an existing careers section in the municipality's web pages.

All rural municipalities have a website and most of them contain some form of job posting pages that present copies of current (and in many cases, outdated) employment opportunities. In some cases the postings are no more than a copy of the newspaper advertisement. While this may have been successful in the past, it fails to live up to the expectations of potential municipal recruitments and the practice does little, if anything, to raise the profile of the municipality.

We see an opportunity for rural municipalities to market and promote rural municipal employment through this medium.

For this practice to be successful, municipalities will need to:

- **Be prepared to make an investment** – consideration should be given to getting professional help to prepare the web pages, both from a content and a technical presentation standpoint. It is a good idea to remember that people read the careers section of the newspaper even though they may not be looking for a job. Similarly, people will browse this section of your website just to see what is available.
- **Determine what message you want to send** – municipalities should think about the possibility of a “Careers Section” or “Human Resources” web page as opposed to a “Job Postings” web page. The human resources option is more involved and will likely be much more persuasive in the longer term.
- **Think about today and the future** – municipalities should make reference to potential future needs. That is, making reference to the succession plan and the competencies that will be important going forward.
- **Get staff involved** – a municipality's best recruiters are its workforce. Providing testimonials from long-time staff and new hires provides an opportunity for staff to participate in recruitment efforts as well as “putting a face” on the municipality.

Developing and maintaining web pages to a level well beyond the simple posting of a job advertisement is costly in terms of time and financial investment, but if it is going to be done, it should be done properly.

Action Steps

In committing to the development and maintenance of a human resources web page, rural municipalities should:

- **Clearly define what the municipality wants to achieve** – the primary objective in developing the web page should be to attract and recruit qualified staff. This implies that the municipality knows what competencies are required today and into the future (career paths and succession plan).

The other considerations are to reinforce the message that municipalities are good places to work and that opportunities are available to grow through mentorship, education and training, etc.

- **Determine what content you are going to include** – if the decision is to build a publicly referencable human resources web page, then you will likely want to include materials such as organization charts, future staffing plans (only those that exist in the public domain), job descriptions, etc., as well as current staffing needs (vacancies) and future competency requirements.
- **Seek professional advice** – the layout and presentation of the web pages are what people (potential candidates, the public, staff, etc.) will see and use to make judgments about the quality of the organization. There is nothing quite as frustrating as clicking on a button to go to a “Job Postings” web page only to find that nothing happens.

Professionals can assist you in preparing the content as well as laying out the presentation. There will be a host of options (text only, text with graphics, text with

pictures, text with audio, text with video, etc.) that should be examined to determine which best presents the image and message you want to send.

- **Prepare appropriate materials** – since there are potentially several different audiences (potential candidates, staff, and the public) be sure and create material that will be of interest for each.

For example, staff may be looking for linkages between education and training and job competencies.

- **Select appropriate representatives** – if you are going to have staff testimonials then it is likely that all staff should be given the opportunity to participate. If handled properly this can be a fun event for all concerned and can be combined with a contest to select “acting” winners.

It is important to remember that the use of testimonials has to be focused on using individuals who are credible to the audience and who convey the right message.

- **Maintain the web page** – perhaps the most critical element of all is to ensure that the web page is kept up to date and relevant.

Raising the profile of the municipality through the use of a modern and utilitarian web page is likely expensive, but it is almost mandatory in today’s Internet connected world.

4.4	Enlist the aid of employee spouses and family to participate in the promotion of the municipality as a “good employer” and the community as a “good community.”
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The Labour Force Survey identified the role of spouses and families as being highly influential in the decision to accept employment with rural municipalities. The decision to move to a new community and to accept an offer with a new employer can be more stressful for spouses in that they have little or no opportunity to ask questions or to express concerns except with their spouses.

Providing spouses with the opportunity to meet with spouses of existing staff is a means of raising the profile of the community and the municipality and a means of signaling to the prospective candidates that the municipality understands the magnitude of the decision for the whole family.

Action Steps

For this practice to be successful, municipalities should consider:

- **Proposing to staff that they ask their spouses to consider volunteering to participate in the recruitment process** – for this volunteer program to work, only those existing staff spouses who want to help should be involved. Attempting to coerce staff into getting their spouse to cooperate will likely result in no cooperation at all.
- **Preparing promotional materials** – this material should focus on matters of interest that will directly impact the spouse. Issues will vary from individual to individual and on the gender of the spouse, but there are common matters of interest concerning, for example, services available in the community, recreational opportunities,

emergency and medical services, as well as employer-specific topics such as employee benefits, working conditions (hours of work, vacation policy, etc.) and employment opportunities.

- **Providing coaching to spouses** – not to script what they will say or discuss, but to provide a level of comfort on how to conduct an information session with an individual who needs/wants to assimilate a lot of information in a short period of time.

This practice of creating a forum for information exchange to further raise the profile of the community and the municipality may also result in avoiding situations that are all too common, such as a candidate accepts an offer of employment only to quit six months later because the family can not/will not adopt the community as their new home.

5. ASSESSING THE NEED TO DELIVER SERVICES

Assessing the need to deliver services focuses on the other side of the economic model for workable solutions. The demand for labour is driven by the demand for services and the reshaping or altering of the perceived demand for services can have a material impact on the need for certain competencies.

We recommend that rural municipalities:

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| 5.1 | Conduct a review of the services provided to the community to determine if all current service offerings and service levels are valued by residents. |
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A municipality's need for competent staff is driven by the requirements of the services provided by the municipality. The demand for services is a function of the community's needs and wants and requires ongoing evaluation to ensure that priority requirements are being met. Low-value or no-value services that fall outside of legislated obligations should be eliminated, reduced or delivered through some alternative mechanism.

This type of evaluation has a variety of beneficial outcomes and from the perspective of the workable solutions, the intent is to eliminate the need for competencies specifically tied to low-value or no-value services.

This type of review is likely best carried out by an independent third party who is familiar with rural municipalities and their service offerings. Objectivity and a defensible set of recommendations will be required to convince residents and staff of the merits of service level changes, especially for those who will be directly impacted.

Action Steps

To maximize the benefits of conducting an evaluation of services, the rural municipality should consider:

- **Establishing a policy that calls for systematic reviews of the service package** – service reviews should be an ongoing process, not an event that is triggered by incidents, economic conditions or third-party intervention. These reviews should look at three primary questions:

1. **Is this service necessary?** – Necessity comes in two forms: the requirement to provide a service based on third-party imposed obligations (typically the provincial government) and a demand for services that are highly valued by residents and not available through other providers.

For many services (e.g., road maintenance) this question is easily answered; but for others, the answer is not obvious. The difficulty for rural municipalities is how to objectively measure value to the community, hence the suggestion of using a third party to adjudicate value.

2. **Is the level or volume of service appropriate?** – Given that a service is deemed to have value, or is an imposed requirement, the next question addresses how much of this service is needed or required. Is, for example, animal control required 24 hours-a-day, seven days-a-week? Is 24 hours an appropriate timeframe in which to have school bus routes plowed after a snowfall?

The answers to these questions obviously require careful consideration and some form of impact analysis will be required to support any decisions to lower (or raise) the level of service.

3. **Is there a different way to deliver this service?** – Knowing that a service is needed and knowing how much of that service is required leads to the final question—how should service be delivered? In rural municipalities, there is often not the choice about whom or how a service to residents will be delivered. That is, if the municipality does not provide the service, then the service will not be provided.

In circumstances where alternatives exist or could be encouraged to exist with the support of the municipality, these alternatives should be explored.

Answering these three questions provides an opportunity to rationalize the competencies that are required to provide services to the community's residents. Competencies that exclusively support no-value and low-value services should be phased out and competencies that support high-value services should be the focus of recruitment and retention efforts.

- **Contracting with an objective third party** – Using a consultant to perform the tasks associated with this evaluation will require the rural municipality to issue a request for proposal (RFP).

A project charter for this initiative is attached in Appendix D.

The objective of this initiative is to ensure that the competencies that are being recruited and retained by rural municipalities relate to services that are valued and required.

6. RE-EXAMINATION OF POSITION QUALIFICATIONS

Position qualifications set the boundary conditions for position recruitment. In some cases, these qualifications have not been re-examined to ensure that the mandatory and desirable categories reflect what the municipality truly values.

We recommend that rural municipalities:

6.1 Ensure that a demonstrated desire to live and work in a rural environment receive an equal or higher consideration than candidate qualifications.

The Labour Force Survey identified one of the major retention issues for rural municipalities was the failure on the part of the municipality and of a newly hired staff member to recognize “community fit” as a mandatory requirement. This issue creates turmoil, anxiety and frustration on the part of both the staff member and the municipality and likely results in separation at some point.

Understanding of this requirement and taking steps to address the problem can prevent unpleasant and dysfunctional outcomes in the future. It should also be pointed out that there are never any guarantees that a new hire will be successful, but there are high probabilities of failure for candidates who have unrealistic expectations about rural municipal working and living conditions.

Action Steps

For this practice to be successful, municipalities should consider:

- **Sourcing candidates locally** – local candidates have local knowledge and as such have a good understanding of what the community is like. They may or may not know what working for local government is like but they do know their neighbours and the community’s issues.
- **Sourcing candidates from elsewhere but with life experience in rural areas and small towns** – candidates will be more likely to have a good understanding of the circumstances and values of rural life even if they do not have immediate local knowledge. Specifics might include advertising in small town newspapers and working with placement services in regional colleges with a pronounced rural emphasis and with a high proportion of students with a rural background (e.g., Lakeland College, Lethbridge Community College, Medicine Hat College, Olds College, etc.).
- **Preparing local information materials** – this material should focus on matters of interest that differentiate your rural community. These factors should include the items identified in the Labour Force Survey:
 - **Distance from** various services such as large retail shopping, etc.
 - **Proximity to** various attributes of the region such as harsh landscapes, etc.

- **Small-sized** services such as schools, etc.
- **Other attributes** of the community such as availability of accommodation, cost of living, etc.

This material should be provided to candidates prior to conducting any interviews with the understanding that the municipality is actively seeking to ensure that the candidate will be fully aware of what makes this community unique.

This is not an attempt to scare off potential candidates, rather it is an opportunity for the candidate to make an informed decision about the community and how well it meets their family's expectations.

- **Providing a similar information package about working for the municipality** – not all candidates will have a background in local government and those that do may not have an understanding of local issues. The materials should include a discussion of:
 - **Multi-function responsibility** which characterizes many rural municipality positions.
 - **Involvement in the community** and the municipality's expectations of the successful candidate.
 - **Dealing with rural issues** of geography, distance, sparsely-populated areas.
 - **Specific local issues** of current concern to the municipality, e.g., annexation, water treatment, road maintenance, etc.

The objective again is to provide the candidate with some background material that will assist them in the decision-making process.

- **Creating an opportunity for the candidate and their family to visit the community** – this potentially could involve significant expenditures depending upon where the candidate is being sourced from. However, this more than anything else will likely give them the opportunity to assess how well they fit into the local community.
- **Using the practice of requiring new hires to go through a probationary period** – this approach could be waived when it is apparent that a probationary period serves no useful purpose; however, there are times when it will. Probationary periods are usually structured in such a way as to allow either party to an employment agreement to back-out without the necessity of providing an explanation. This approach avoids embarrassment, name-calling and other such outcomes.

Community fit is a mandatory requirement for hiring in practically any situation, but its importance grows as communities get smaller and distances from particular services increases.

6.2	Review personnel policies and practices that require minimum levels of education and experience to re-establish what are mandatory versus desirable qualifications.
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Position qualifications are supposedly representative of the capabilities and capacities that are necessary to efficiently and effectively perform the duties and responsibilities of a particular job. In many rural municipalities, the articulation of position qualifications begins with the job description and then evolves as specific individuals are placed in the position. Individuals, when asked to update their job descriptions, will typically apply their own qualifications regardless of applicability to the position.

In some municipalities, personnel policies are enacted to set minimum levels for certain attributes such as education and experience, for example, the municipality may require a high school diploma as a minimum for any position. Over time, position qualifications become highly prescriptive, detailed and in some cases, non-representative of the competencies required.

Examples of this can be found in job advertisements that state, for example, that the applicant must have fifteen years experience or that a university degree in a particular discipline is mandatory. These position requirements may or may not be desirable, but they rarely are mandatory. What they typically reflect is that a former incumbent possessed these qualifications or that, in times of excessive labour supply, qualifications become a way of screening candidates.

Rural municipalities should undertake a review of position qualifications with the intent of realistically evaluating which competencies are mandatory and which are desirable. The objective is to ensure that the municipality is not missing out on qualified candidates who do not apply or are rejected because their credentials do not measure up to position qualifications.

This practice does not suggest that all qualifications are not required or justified especially where health and safety issues apply.

For this practice to be successful, municipalities should consider:

- **Updating job descriptions** – job descriptions define the work that is to be performed by the incumbent. At a minimum the job description should include: a position title, a listing of the duties to be performed and an explanation of the authorities, responsibilities and accountabilities.
- **Developing personnel policies** – to address making position requirements competency based. This would include such things as:
 - **Defining mandatory versus desirable position requirements** - these are not the requirements themselves, rather the definition of what shall be included as a mandatory versus a desirable requirement. For example, provincially-imposed credentials for a particular duty should be a mandatory requirement.
 - **Defining position requirement categories** – requirements can fall into a host of different categories. The importance of each category will likely vary from position to position. Categories can include, for example, level of education or training, certification levels achieved, years of experience in performing certain duties, responsibilities held, authorities exercised and accountabilities held.

The policies set the framework for populating each of the position descriptions.

- **Setting minimum mandatory position requirements** – for each position the minimum mandatory requirements should be established.
- **Re-crafting position requirements as required** – while it may be desirable to re-craft all position requirements at the same time, it is realistically possible to only re-craft them as positions are vacated and replacements required. Using the minimum, mandatory requirements as a base, other position requirements can be included as desirable.

These requirements should not only reflect what is desirable, but also reflect the availability of candidates to fill the position. That is, if the market is such that there will be many candidates available, the desirable requirements can be used to more narrowly focus the job search. Conversely, in times of a labour shortage, the desirable requirements can be limited to permit the greatest opportunity to attract candidates.

Action Steps

Some points to consider in the process of updating position requirements include:

- **Involving staff in updating job descriptions** – some planning and pre-work is necessary before asking staff to update and revise their own job descriptions. The most difficult and the most important facet of this exercise is to have staff divorce their own credentials from what is required to be competent in their job. There is some risk that specific staff members may see this as a downgrading of their jobs in the eyes of management. This task will require direct supervisors to not only complete their own update but to review and revise the job descriptions of the staff who report directly to them.
- **Applying imposed credentials to mandatory, minimum requirements** – there is a companion volume to this report which identifies mandatory credentials for a host of rural municipal positions. The municipality may choose to establish higher minimum standards than those imposed by other levels of government.
- **Estimating minimum competencies** – there is a host of categories that rural municipalities may group position requirements into, however, there are a number of standard categories that include:
 - **Years of experience required** – this factor should include the amount of time that it will take to complete the learning curve to perform this job. This is the minimum level of competency. Other factors may include time spent performing similar, but different, duties.
 - **Level of education and training** – for a minimum competency this factor should include only job-specific education or training that is required to perform position duties.
 - **Certifications or credentials required** – closely related to education and training but more closely focused on the attestation of a certifying body that the individual is capable of performing certain duties.

- **Establishing desirable requirements** – desirable requirements can be either an extension of the mandatory requirements, that is, four years experience is desirable when two years is the minimum, or they fall into separate, additional categories such as “experience in working cooperatively with neighbouring municipalities ...”

The number and level of desirable requirements should reflect the labour market not the competencies required to perform in the position.

6.3	Focus on recruiting the “family” during the recruitment process by offering to provide employment or employment services to the spouse and other family members.
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The Workable Solutions Survey identified the family, and in particular the spouse, as being a major influence in the decision by candidates to accept or reject a position offering. In some cases the spouse is being asked to give up or interrupt their careers to make the move to a new community.

Rural municipalities need to think in terms of recruiting the family and being open to the possibility of gaining two staff members instead of just one.

Action Steps

For this practice to be successful, municipalities should consider:

- **Querying short-listed candidates about their spouse’s career aspirations** – for candidates that have reached the interview stage of the recruitment process, the municipality can demonstrate both an interest in the family and potentially source an additional set of competencies. Introducing the possibility at this stage may further enhance the municipality’s profile with the candidate.

In situations where it is appropriate, that is, the municipality has made an offer to the candidate and the candidate expressly agrees to having the municipality contact their spouse directly, the municipality should consider:

- **Soliciting a résumé from the spouse** – this solicitation should be presented as an offer to assist the spouse if they wish to take advantage of the municipality’s position within the community. The offer to help is not an offer of employment nor is it a guarantee that a job will exist.

The solicitation should be followed up with an interview to confirm the career aspirations and the contents of the résumé.

- **Attempting to match the spouse’s aspirations and qualifications with competency needs of the municipality** – potentially the spouse may possess credentials that are inline with the current or future requirements of the municipality. If the spouse represents a potential hire, the municipality should proceed with recruitment using the normal recruitment process.

If there is no potential match between the spouse and the municipality, the municipality should consider:

- **Facilitating the spouse's job search** – this can be accomplished by preparing a list of potential employers and reviewing this list with the spouse to identify specific target organizations. The municipality may then offer to assist the spouse in making contact with the employers.

The municipality's efforts should be curtailed at this point. The objective is to provide assistance but not to be seen as a guarantor to either the spouse or to other potential employers.

6.4	Introduce flexible working conditions, subsidization or service provision to enhance recruitment and retention success.
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The Workable Solutions Survey identified a series of factors about rural municipalities that negatively impact on the ability of the municipalities to attract and/or retain staff. In addition, a number of respondents to the survey indicated success in attracting new staff by being more flexible in setting working conditions.

A number of the negative factors focus on distance from services and events that are of interest to staff and their families. The potential exists for municipalities to address a number of these negatives by providing a service such as transportation to the nearest major urban centre where the desired service is available or subsidizing the cost of such travel.

Similarly, rural communities may sometimes lack desirable living and working conditions such as the availability of accommodation or job opportunities for spouses. Municipalities may potentially alleviate the negative condition through, for example, some form of subsidization for housing or providing interim accommodation while other remedies are pursued. In some cases of severe housing shortage, the municipality may have to build housing and make that available on a permanent or interim basis to incoming staff.

As well, the working conditions or conditions of employment at the workplace may also exhibit negative factors that push individuals away from remaining with the municipality or deter others from pursuing employment.

For this practice to be successful, municipalities should consider:

- **Conferring with staff to identify the materially negative factors** – the Labour Force Survey is a starting point for establishing a baseline concerning what potential negative retention factors exist with the community. The objective is to identify negative factors that the municipality has the potential to mitigate. There are obvious factors such as climate or lack of daylight in the wintertime that the municipality has no ability to address directly. Other factors such as distance from services may not be directly addressable, but may be mitigated by providing affordable and easily accessible transportation.

Other factors such as access to medical practitioners may be directly addressable or can be addressed by attracting, through subsidization or other means, a doctor to become part of the community.

- **Rewarding staff for suggesting solutions** – finding solutions is sometimes as close as the suggestions box. We are aware of situations where employers have involved staff to identify problems but ignored them when it came time to find solutions. This is not a good idea when the problem and the solution are focused directly on staff.

Staff need to be involved to ensure they have had the opportunity for input and more importantly the opportunity to endorse solutions.

Offering rewards is a means of placing significance on the request for assistance and provides an incentive to participate.

Action Steps

Some ideas that may be helpful in framing solutions that are centered in the workplace include:

- **Looking at working conditions** – some of the most obvious roadblocks to accessing potential staff members lie in the institutionalized nature of the municipality's working conditions. For example:
 - **Full time versus part time employment** – municipalities, along with other employers, will favour full-time employment to the exclusion of other considerations. Why not part-time or job-sharing of positions? The usual answer is that we have never tried it or we tried it once and it did not work.
 - **Flex hours** – do all staff have to start at the same time and finish at the same time? The possibility exists to provide better service by having some staff start earlier in the morning and other staff stay later in the day. This flexibility may suit some staff better than the regular hours. Other people may be better accommodated by providing longer hours in a four-day work week or for modified hours during specific seasons (seeding or harvesting) to assist a family business or farm. Ability to do this is obviously conditioned by the impact on delivery of services to the public.
 - **Working outside the office** – do all staff have to work from the office? In today's networked world it is possible to stay completely in touch electronically without the necessity of being constantly available in the office. This again may fit some staff better than others, but it could make working a reality for some who are otherwise housebound.

6.5 Review the municipal minimum levels of certification to ensure that the municipality is meeting the minimum requirements, while at the same time, not exceeding them unnecessarily.

One of the major work steps in preparing the Workable Solutions Survey was a review of the education and training requirements for working in local government in rural municipalities. Included in this review was the identification of minimum levels of certification that are required by other levels of government and other relevant stakeholders (see: Appendix B – Neil Document).

Compliance with the established minimum requirements is obviously a priority for local government and becomes significant when addressing required competencies for municipal positions. The flipside of this discussion is a situation where a municipality has set internal minimum requirements for a position that exceeds the established minimums for reasons that are neither obvious nor desirable.

From a workable solutions perspective, rural municipalities should meet the established minimum and exceed that minimum only when there is a justifiable reason to do so. The issue is not hiring someone who has qualifications that exceed the position requirements, rather the issue is setting position qualifications higher than is necessary and then being unable to staff the position.

Action Steps

To ensure municipalities are complying with established competency minimums and are not exceeding minimums unnecessarily, municipalities should consider:

- **Matching regulated requirements with the municipality's position complement** – using the Neil Document in Appendix B, municipalities should match the established minimums with the position requirements of existing municipal positions. The objective is to:
 - **Identify missing position requirements** – the potential exists for established minimums to have been missed as a position requirement. The omission should be corrected. If the omission has led to a gap in the qualifications of the incumbent staff members, measures should be taken to address the gap.
 - **Highlight out-of-date or erroneous position requirements** – established minimums change, sometimes frequently, and the potential exists for position requirements to be out-of-date or simply wrong. The position requirements should be updated. If the error has led to a gap in the qualifications of the incumbent staff member, measures should be taken to address the gap.
 - **Identify position requirements that exceed established minimums** – in situations where the position requirement materially exceeds the established minimum and there are no compelling reasons for the disparity, the position requirement should be re-set to the established minimum. No action is necessary with the incumbent staff member.

The objective is to ensure that the municipality is not unnecessarily limiting who may be a candidate for assuming a position that has an established minimum.

7. PROVIDING ACCESS AND OPPORTUNITY FOR EDUCATION AND TRAINING

Providing access was one of the major conclusions that came from the review of post-secondary programs. Programs exist for all required rural municipality competencies, but for some municipalities, distance and/or cost set up a barrier that is difficult to overcome.

We recommend that rural municipalities:

- 7.1 Actively work through AAMDC to access education and training appropriate for municipal employees.

Individuals who wish to participate in educational and training programs that are appropriate for municipal employees can face a daunting task in determining not only which programs to select, but also which provider.

Rural municipalities make use of a wide range of qualifications and certifications (see Municipal Labour Force Qualification and Certifications chapter) delivered by a large number of public and private institutions and organizations. In an environment where training and re-training of staff is becoming more critical, there is need to understand the post-high school education and training environment and the strengths and limitations of those institutions and organizations.

We have recommended that AAMDC provide a coordination and facilitation service that links municipal employment needs and educational resources (see Support From AAMDC – 10.7).

The goal of a highly educated and trained workforce will be facilitated by rural municipalities actively working with AAMDC on behalf of their employees to identify programs of study that fit the needs of both the employee and the municipality.

Action Steps

To maximize the benefit of this service, rural municipalities should consider:

- **Designating a resource within the municipality to coordinate employee education and training** – many rural municipalities may have an appropriate resource in place through the human resource function. The role of the coordinator will be to:
 - **Work with employees** – the assistance to employees will focus on determining what programs of instruction are appropriate given the employee’s career path and the needs of the municipality.
 - **Work through AAMDC** – the coordinator will work with AAMDC to build the most appropriate plan of studies for the employee. This will include determining who the provider should be, where the instruction is given, what media is appropriate (distance learning, on-line, on-campus, etc.) and what timetable is realistic.
 - **Assist the employee in making arrangements** – this could include everything from helping the employee seek financial support from a third party to arranging travel and finding a mentor.
 - **Tracking progress and performance** – the coordinator will also keep track of how the employee is progressing and will update the succession plan as the employee reaches specific development milestones.

The objective in working through AAMDC is to provide rural municipalities and their employees a well-informed and focused resource for information and advice about accessing education and training appropriate to rural municipalities. This will help relieve the municipality and/or the employee of the task of sourcing the most appropriate program, the most appropriate provider and so on.

8. ADDRESSING COMPETITIVE COMPENSATION

Competitive compensation addresses the number one priority identified in the Workable Solutions Survey. The perceptions of disparity between the compensation paid by private sector organizations, especially the resource industries, and the compensation provided by rural municipalities requires serious consideration.

We recommend that rural municipalities:

- 8.1 Review compensation packages on a regular basis, at least every three years, and compensation levels every one to two years, as appropriate.

Out-of-date compensation packages that fall behind the marketplace are likely the leading reason for failing to attract new staff and retain existing staff. The Workable Solutions Survey validated this observation, in part, with the survey response “Salary Perceived to Be Below Market” as the number one retention issue in both the long and short term.

Knowing who the market is and what the market is offering are key insights that rural municipalities need to address if they are to be competitive. Traditionally, rural municipalities have compared themselves to other municipalities that have similar characteristics such as population, assessment base, geographic positioning and the like. As well, they would include neighbouring municipalities, including larger urban centres that fell within their boundaries. Typically salary and wage information would be collected through solicitation or through extraction from the annual compensation survey conducted by AAMDC.

The problem with this approach is that it fails to recognize that the market is made up of a host of different industries with various-sized players who value the same competencies as rural municipalities. These are the organizations that rural municipalities compete with for staff.

Finding out what the market is offering is the other key variable. Public- and private-sector organizations are surveyed constantly about every conceivable issue. Compensation is no exception. It is not unusual to get a very poor response rate (less than 20%) especially when the respondents recognize that the surveyor is asking questions about compensation. In a hot economy compensation is a factor that contributes to most organizations’ competitive advantage and sharing this information with someone who is competing with them for staff is rare.

Action Steps

To make compensation package reviews effective, rural municipalities should consider taking the following steps:

- **Establishing a policy that calls for periodic reviews of the compensation package** – rather than waiting for staff to signal when it is time to conduct a review, the municipality should adopt a policy to review the contents of the compensation package every three years and the pay levels every one to two years, depending upon local market conditions.

This practice takes the guesswork out of the equation for staff and allows them to gauge when market adjustments will be made.

- **Adopting a consistent plan basis for compensation** – rural municipalities use a variety of different compensation models that typically have evolved from the last compensation plan review. For the sake of consistency and for added transparency in explaining how the review process is conducted, a consistent model should be adopted. We favour a position points-based system which is easy to understand and takes into account both internal and external equity.
- **Determine who are your competitors for staff** – keeping track of where former staff have gone is important if the municipality is to identify who competes for staff. Passive sources of information, such as reviewing career sections to highlight job opportunities that would be attractive to municipal staff, provide another insight into who is a competitor.
- **Determine your desired position in the marketplace** – this is probably the most important decision to be made. Municipalities typically have a great deal of difficulty in coming to grips with the necessity of being beyond the market average to avoid being below market.

For any individual, the term “market value” refers to the highest level of compensation that is being offered, not the average. Positioning in the market therefore requires that the municipality be aware of the range of values that are being offered. The desired position in the marketplace is likely one where you are high enough to attract new staff and low enough that existing staff do not start leaving.

- **Devise an effective approach to survey the market** – typically municipalities prepare a survey with job titles and send out the same survey to all potential respondents. This de-personalized approach is usually compounded by attaching a non-descript form telling the respondent where to send their response.

This approach does not usually work very well and consideration should be given to:

- Preparing separate surveys for distribution to different market sectors depending upon the job competencies.
- Attaching the job competencies as a descriptor for the positions.
- Contacting specific individuals in the comparative organizations and requesting their participation.
- Limiting the amount of information you collect.
- Asking the respondent to qualify their comparative positions based on a comparison of competencies – e.g., 75% fit.
- Using electronic media as much as possible to cut down on printing, writing and resending by fax or courier.
- Requesting a response as soon as possible.

Examples of survey material are attached in Appendix E.

- **Respecting anonymity** – there will be situations where organizations may be willing to participate but direct that their responses not be attributable to them. In fact, most private sector firms will not respond unless you are working through a third party who has pledged to keep their information confidential. Management consultants are available in the marketplace to fulfill this function.
- **Giving something back** – typically respondents to the survey are offered a copy of the summary results with all references to who participated kept in confidence.
- **Updating the plan quickly** – once staff are aware that the compensation plan review is underway there is an expectation that something positive will result in very short order. This expectation must be managed and at the same time every effort should be made to complete the review as quickly as possible and have the result available for use shortly thereafter.

Compensation is not the only variable considered in recruitment and retention decisions, but it is likely the most important.

8.2 Consider supplementing compensation packages with added benefits that provide an incentive to become and remain a municipal employee.

Compensation packages include both a salary/wage component and a benefits component. Remaining competitive with compensation packages includes looking at ways to enhance the benefits package.

Determining what is attractive to employees will depend upon who the employee is, their marital status, their age, etc. This can present a problem when trying to package a program together for a diverse staff complement. Typically, after basic coverages have been addressed (drugs, LTD, etc.), benefits related to time and money (paid leave, RRSPs, etc.) have more universal appeal than those that deal with cost avoidance (physiotherapy, podiatry, etc.).

Action Steps

To maximize the effectiveness of benefit programs municipalities should consider:

- **Surveying employees to determine what current benefits are valued** – the first place to begin is to look at the current benefits package and determine if there are benefits that are of little value to employees and could potentially be dropped.
- **Surveying employees to determine what missing benefits are valued** – this should be presented in a way that also queries:
 - **What would the employee be willing to pay for this benefit** – if benefits are presented as 100 per cent employer-funded then all benefits are valued. The determination of value requires some consideration of the cost.
 - **What benefit would the employee be willing to give up to acquire this benefit** – again, by attaching some value (giving up another benefit) the determination has more credibility.

- **Using a “cafeteria-style” benefit plan approach** – where basic coverages are mandatory and additional benefits can be added up to a maximum allowance value. This type of approach provides employees the ability to pick and choose the coverages that best suit their needs. If additional coverages are desired beyond the maximum, the employee would have the option of acquiring these on a reduced-subsidy or no-subsidy basis.

This approach is sometimes called a “flex plan” or a “menu plan” and various forms of it have been adopted by organizations that are attempting to address the diversity of benefit needs among a host of employees.

The following list of advantages and disadvantages are reproduced from copyrighted material prepared by the Chartered Institute of Personnel and Development.

Typically the advantages of this type of program are:

- Employees choose benefits to meet their needs and value these benefits more highly.
- Employers and employees share the responsibility for providing benefits.
- Employers provide benefits at a known cost that is fixed regardless of the choices that employees make, allowing them to cap future benefit costs.
- Employees have a true idea of the full worth of the benefits package they receive and employers do not provide benefits that are not valued.
- Employees are given a sense of control and involvement by having a choice.
- Dual-career couples avoid having benefits duplicated by their respective employers.
- Employers are seen to be more responsive to the needs of an increasingly diverse, demanding and ageing workforce.
- A competitive benefits package is valuable in attracting and retaining key personnel.
- The awarding of benefits such as company cars becomes less divisive.
- Employers’ demands for flexible working practices are more justifiable if employees enjoy flexible benefits.

Disadvantages to this type of approach include:

- Employers find them complex and expensive to set up and maintain (although new technology is reducing both the cost and administrative burden).
- **Including items not traditionally offered** – benefit programs are traditionally thought of as being part of two or three basic categories: health and wellness benefits, retirement benefits and in some municipalities, formalized education and training benefits.

The opportunity is to add benefits that address local situations and specific needs. Examples of these include:

- Child Care.
- Home Purchase Assistance.
- Rewards for Sourcing New Staff Members.
- Relocation Benefits.
- Health Clubs.
- Unconditional time off.

The objective is to identify benefits that are valued by employees and to have employees participate in the selection.

8.3 Consider extending the benefit package to seasonal workers and part-time employees.

Several respondents to the Labour Force Survey indicated that they had been successful in retaining a greater proportion of their season and part-time labour force by extending benefits coverage.

This approach may or may not be an expensive solution depending on whether or not the full benefits package is offered and whether or not some tiering of eligibility is introduced.

It is likely advisable to seek assistance from your benefits provider to optimize how the package for non-full-time staff is developed.

8.4 Actively promote the value of working where you live and the benefits of working for local government.

Individuals sometimes make career changes and employment moves without really having evaluated all the factors necessary to make an informed decision. Rural municipalities have an opportunity to assist existing staff and potential staff by providing them with the facts concerning the value of working where you live and the benefits of working for local government.

Having a competitive compensation package is a primary feature of any strategy, however, it is not the only factor that needs to be taken into account. We recommend that rural municipalities also emphasize the attributes identified in the Workable Solutions Survey as being positive

influences on the decision to accept offers of employment and to remain local government employees in a rural community.

We suggest emphasizing the following top five community-related factors:

1. Benefits of living in a small-sized community.
2. Proximity to family.
3. Proximity to recreational pursuits.
4. Distance from large urban centres.
5. Proximity to wilderness landscapes.

We also suggest emphasizing the following top five work and economic environment related factors:

1. Multi-functional position responsibilities.
2. Opportunity to deal with rural issues.
3. Involvement of the community in local government.
4. Cost of living.
5. Opportunities for spousal employment.

A strategy to attract and retain rural municipal staff requires a multi-faceted promotion that is proactive and ongoing. Like most “marketing” efforts, the message requires constant reinforcement to become effective and long-lasting.

9. SUPPORT FROM COUNCILS

Support from councils is fundamental to the success of any strategy and this one is no exception. In our minds councils will need to demonstrate support by making resolutions that focus on key elements of the strategy, such as compensation, regional service delivery and the like.

We recommend that rural municipal councils direct administration to:

- | | |
|-----|--|
| 9.1 | Prepare a human resources plan that identifies the current levels of resource competencies, the future needs and a plan to address the gaps. |
|-----|--|

Rural municipal councils need to demonstrate their recognition of the value of their human resources by directing administration to put into place a plan to grow the competency of staff to sufficient levels to meet the future needs of the municipality.

The human resources plan is a compilation of the deliverables that result from the adoption of a number of the practices identified in previous sections including a succession plan for the

municipality, career paths for individual employees, action plans for maintaining relationships with retiring employees, etc.

Council's role is to act as a champion by endorsing the preparation of the plan and monitoring the progress and performance of administration in carrying out the various initiatives to put the plan in place.

9.2	Undertake a formal review of the current municipal compensation plan to determine if the levels of compensation are competitive and to develop a plan to address any shortcomings.
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Rural municipal councils need to adopt a policy that demonstrates their recognition of the value of their human resources by directing administration to put into place a plan to keep the municipality's compensation package competitive with the local marketplace.

The compensation plan includes both salary and benefits and should follow the outline detailed in the practices presented in the previous section: Addressing Competitive Compensation (strategy 8.1).

Council's role is to act as a champion by endorsing the update of the plan and monitoring the progress and performance of administration in carrying out the various initiatives to meet the targets set by council. Council's targets should include a determination of who the municipality should compare itself to and the quantification of market positioning.

The setting of targets should be performed in consultation with administration to ensure the risks, benefits and costs of various courses of action are explored.

9.3	Undertake an evaluation of the potential of extending the benefits package to seasonal and part-time workers.
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Rural municipal councils need to demonstrate their recognition of the value of their human resources by directing administration to examine the costs, benefits and risks of providing benefits to non-full-time employees.

The benefits package should include consideration of the various factors identified in previous sections, as well as tailoring the package to consider the needs of non-full-time staff.

Council's role is to act as a champion by endorsing the evaluation of the possible offering of benefits to non-full-time staff. Council's ultimate decision to proceed or not should be based on a set of criteria associated with the feasibility on the initiative.

The setting of criteria should be performed in consultation with administration and should include consideration of factors such as:

- Maximum costs.
- Minimum benefits.
- Risk mitigation.
- Contractual obligations.
- Ease of implementation.

- Ongoing plan maintenance.

9.4 Assess how the municipality can and should access the Municipal Internship Program.

Rural municipal councils need to demonstrate their recognition of the value of their human resources by directing administration to examine the implications of participating in the Municipal Internship Program and the potential for hiring program graduates.

The examination should include recognition of the plans of Municipal Affairs and Housing to extend and enhance the program over the period of the next several years and the potential for the development of a program for existing staff members that offers similar benefits.

Council's role is to act as a champion by endorsing the concept of participation in the MIP and to be open to the potential for regional cooperation to effectively access the program.

9.5 Conduct a review of current services and service levels to determine if all service offerings are valued by the community's residents.

A rural municipality's need for competent human resources should be driven by two overriding factors: one, the dictates of third parties who have the power to necessitate requirements and two, the service level needs of the communities' residents. Other factors, such as contractual obligations, may also influence the need for certain skill sets, however, the municipality is in a position to either control or negotiate these requirements.

Municipal services tend to evolve over time and reflect both the needs and wants of community residents and the capacity of the municipality to fund them. A service, once it has been embraced by the municipality, tends to remain a service offering until financial hard times force a critical look at what the municipality can afford to deliver.

Difficult recruitment and retention times should also force a critical look at what services are being offered and their value to community residents.

Council's role is to act as a champion by endorsing the evaluation of services, to determine if any services can be eliminated, levels of service reduced or delivered through an alternative mechanism.

10. SUPPORT FROM AAMDC

Respondents to the Workable Solutions Survey indicated that AAMDC was in a position to provide a series of services that centre on coordination, standards setting, providing a focal point, etc.

We see the need for a central body to be the coordinator of education and training for rural municipalities. This role speaks for rural municipalities and takes into account the uniqueness of rural community settings when, for example, discussions are held with post-secondary institutions concerning the delivery of programs. While it may be argued that MAH or the professional associations should be doing this, AAMDC is the only body that addresses both the administrative and political faces of rural municipalities.

We recommend that AAMDC:

10.1 Actively promote rural municipalities as an employer through the development of promotional materials that can be used as-is or enhanced with local content by rural municipalities.

Rural municipalities are being encouraged to promote themselves as “good places to work” as part of a long-term strategy to attract and retain staff. Individual municipalities may lack the financial resources or the competencies required to develop promotional materials to support this practice.

AAMDC is in the position of being the advocate for all rural municipalities and potentially has the competencies to design and develop materials that focus on the uniqueness of these municipalities.

The advantage of having one voice to prepare the messages comes in the consistency of themes and the commonality of the content upon which individual municipalities can base their own promotional efforts. This is not a one-size-fits-all approach, rather it is an opportunity to build a foundation that provides a common starting point that individual municipalities can either elaborate on, if they are capable and inclined to do so, or use as-is.

AAMDC is currently partnered with ARMAA, AUMA, LGAA and SLGM to complete a project entitled *Municipal Careers: Marketing Strategy Scoping and Development Project*. The results of this initiative should tie-in directly with the intent of this strategy.

10.2 Provide assistance to municipalities in the development of human resource plans through the preparation of models and templates.

Rural municipalities are being encouraged to prepare a number of human resource plans (succession plans, individual career paths, etc.) that require specialized knowledge and experience to complete successfully.

While many of the associations that are related to local government, in general, and some constituencies of rural municipalities, in particular, have some knowledge of what should be included here, no single agency has taken the initiative to develop the tools to assist rural municipalities. AAMDC is uniquely positioned to develop and maintain a common approach to human resource planning.

AAMDC is encouraged to involve and work with agencies such as the Local Government Administrators Association (LGAA) and the Alberta Rural Municipal Administrators Association (ARMAA) to develop a human resources toolkit for rural municipalities.

The advantage of having one common approach is the portability of competencies among rural municipalities. The use of common approaches also promotes and facilitates cooperation and comparability which are two cornerstones to advancing, where appropriate, cooperative regional service delivery.

The format and content of the models and templates should follow the outline presented in various other recruitment and retention practice suggestions.

10.3 Undertake an initiative, in partnership with the provincial government, to examine all municipal positions that require minimum levels of certification to determine if certification is still appropriate and required.

The research material prepared as background for the Workable Solutions indicated a number of positions in local government that require staff to be certified before they may perform a specific role. The notion that certification is a requirement has evolved from a host of different interests including health and safety issues, professional exclusivity requirements and technical competencies.

The net effect of these is to place obligations on rural municipalities to recruit and retain specialized and in some cases, scarce, resources. The intent of this review is to work with the provincial government to validate the requirement for certification and to reduce the obligation where appropriate.

As the research indicates, the certifying bodies include provincial government departments and agencies, as well as professional associations and other third parties. The review process should include both a review of the need for certification and an examination of the process to acquire certification to ensure the best interests of the public are being served.

10.4 Examine the potential for expanding the current web-based job posting capability to provide a medium for both recruiters and job seekers.

The provision of a web-based bulletin board to post job openings is a passive approach to facilitating recruitment. While this approach is a significant benefit as a centralized service, it potentially could be enhanced by making the offering both a job recruiter and a job seeker registry. The primary advantage of this type of service is the focus on retaining municipal workers in local government. That is, providing a “path-of-least-resistance” for municipal employees to securely post a résumé and municipalities to post job vacancies, creates a medium where two-way browsing is accomplished.

There are a number of highly successful commercial websites operating with this type of functionality. The premise is that both job searches and recruitments can be targeted by region, by competencies, etc. which reduces the timeframe and the overhead associated with both.

Bringing a service of this magnitude online is not a trivial task and there are several obvious security issues that would present some risks. However, the potential benefit to local government, in general, and individual municipalities, in particular, as well as to job seekers, are significant and material.

The potential also exists to combine this initiative with other labour force Initiatives such as web-based human resources toolkits, education and training resources, workshops, etc.

10.5 Examine the potential for developing and providing regional workshops to assist in the establishment of regional mentoring/training programs and training and support for recruitment and retention activities.

Not all rural municipalities have the in-house expertise to develop and implement the numerous practices associated with recruitment and retention activities. Training of this nature requires knowledge and experience to create a solid foundation upon which to exercise the practices.

Making this type of training available as a service to municipalities needs to come from an organization that understands the general requirements of local governments and the specific needs of rural municipalities.

The various topics that could be addressed by this workshop approach include a series of how-to sessions about:

- Establishing regional mentoring/training programs and examining the potential for regional partnership for service delivery.
- Preparing career paths.
- Developing succession plans.
- Participating in school career days.
- Accessing municipal education and training.

10.6 Advocate the development and implementation of Workable Solutions' initiatives with rural municipal councils.

We believe it will be advantageous to periodically reinforce the commitment of AAMDC to the Workable Solutions by lobbying rural councils to evaluate their municipality's success in implementing specific initiatives.

Rural municipal councils have many priorities and the need to maintain a long-term perspective on labour force issues makes it important that AAMDC be persistent in bringing the Strategy to the forefront.

10.7 Provide a coordination and facilitation service linking municipal employment needs and educational resources.

The background research performed in the development of Workable Solutions indicated a significant gap in the linkage between rural municipality education and training needs and the providers of educational resources. The coordination and facilitation service envisioned here is not seen as a replacement for the development and accreditation of individuals that is provided by professional societies and associations. This service would be a broker of information about the education and training opportunities that exist for all rural municipal competencies.

The specific services could potentially include:

- Working with providers and municipalities to facilitate the local delivery of education and training.
- Overcoming the access issues of distance and time by participating in the development of distance learning techniques for rural municipal competencies.
- Developing qualification and certification laddering for employees and positions.
- Working with Municipal Affairs and Housing and others for financial support.
- Advocating for education for rural municipalities.

The list of education and training needs identified in the research is significant in length and scope and it is likely that during the initial stages of establishing this service, only priority needs would be addressed.

10.8 Consider providing a broad spectrum of human resources to rural municipalities who require assistance to carry out core human resource functions.
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Rural municipalities that are unable or unwilling to establish a human resource function within their administration organization are at a disadvantage when it comes to competing for scarce competencies. Core activities such as recruitment, planning, education and training, etc. are fundamental to maintaining and growing the human resources necessary for a sustainable workforce.

We have recommended that AAMDC offer individual services (see recommendations, 10.2, 10.4 and 10.5) for specific initiatives that we identified through our contact with the AAMDC membership. This recommendation goes a step further and suggests that AAMDC consider being more proactive and provide a more complete service offering.

It is our belief that the need for human resource management capabilities will continue to grow and that those rural municipalities that lack the competencies to be competitive will be increasingly disadvantaged.

11. SUPPORT FROM THE PROVINCIAL GOVERNMENT

The provincial government and, in particular, Municipal Affairs and Housing, has a major role to play in making the workable solutions for rural municipalities a success. Many of the local government supports that used to come from MAH have been eliminated or handed over to relevant associations to deliver. What still remains in terms of the Municipal Internship Program, the development of educational material, etc., as well as of funding, are valued contributions.

We recommend that Municipal Affairs and Housing:

11.1 Undertake an initiative in partnership with AAMDC to examine all municipal positions that require minimum levels of certification to determine if certification is still appropriate and required.

The research material prepared as background for Workable Solutions indicated a number of positions in local government that require staff to be certified before they may perform a specific role. The notion that certification is a requirement has evolved from a host of different interests including health and safety issues, professional exclusivity requirements and technical competencies.

The net effect of these is to place obligations on rural municipalities to recruit and retain specialized and in some cases, scarce, resources. The intent of this review is to work with the provincial government to validate the requirement for certification and to reduce the obligation where appropriate.

As the research indicates, the certifying bodies include provincial government departments and agencies, as well as professional associations and other third parties. The review process should

include both a review of the need for certification and an examination of the process to acquire certification to ensure the best interests of the public are being served.

11.2 Undertake continued expansion of the Municipal Internship Program (MIP) to include the currently proposed financial officer and assessor positions.

The MIP focus on senior administrators has served local government well by developing and retaining a very high percentage of interns in local government. The current proposal to expand the program to include specific developmental activities for financial officers and assessors is consistent with the priority identified in the Labour Force Survey.

We support the province's decision to expand the program in this manner.

11.3 Undertake further expansion of the Municipal Internship Program (MIP) to include additional senior management positions.

The current and proposed scope of the MIP (CAOs, planners, financial officers, and assessors) should potentially include other senior administrative management positions. At a minimum, the position of senior public works/transportation administrator was identified in the Labour Force Survey as a chronic recruitment problem for rural municipalities.

This position typically has the largest budget allocation in any rural municipality and the need for competent, professional management is paramount. This individual is probably second only to the CAO and the mentorship afforded by the MIP is the only source of training for this type of exposure.

11.4 Broaden and strengthen the recruitment of interns from regional colleges and technical institutes to potentially enhance the probability of finding appropriate "community-fit" candidates in rural municipalities.

The MIP has been successful in attracting a diverse population of interns from a number of universities, both in Alberta and across Canada. The expansion of the program, and the rural municipality's need to have candidates who fit the community, suggests that the sourcing emphasis for candidates may also need to be expanded to focus on regional colleges and technical institutes.

This is not suggesting that all post-secondary students were not eligible to apply in the past. The requirement here is to re-double promotional efforts to attract candidate interns from rural Alberta.

11.5 Further develop and strengthen the regional cooperation approach for "sharing" of interns.

The MIP has facilitated the sharing of interns among municipalities where individual municipalities lack either or both financial and mentoring resources. Responses to the Workable Solutions Survey suggest that a greater rural municipality penetration of the internship program can be achieved through subsidization and facilitation of the sharing on interns.

This broader exposure for interns will likely enhance the experience for interns and better prepare them for a career in local government.

11.6 Develop a MIP type program for existing municipal staff.

The MIP has been designed to attract students who are not currently working in local government. The results of the Workable Solutions Survey suggest that one of the major retention difficulties for rural municipalities is the perception of staff that they are caught in a functional “silo” that limits their ability to grow and develop.

The introduction of a program for existing staff that mimics the broad-based exposure of the MIP offers the potential to overcome the silo effect and remove the barriers to professional development as a local government manager.

7. RECOMMENDATION SUMMARY

The recommendations provided in this chapter range from simple changes in personnel practices to complex initiatives that involve a number of other stakeholders.

To assist municipalities in sorting them all out, we have assembled recommendation categories one through eight (Recommendations for Rural Municipalities) in a table that cross-references each to a level of complexity.

Table 6.1
Recommendation Summary

Recommendation		Complexity Grouping		
Ref. No.	Description	Change in Practice	Significant Initiative	Requires Professional Help
1.	Looking Locally			
1.1	Focus attention on sourcing candidates from non-traditional areas such as retired workers, spouses and family of staff, under-employed residents and the like.	✓		
1.2	Solicit the active participation of their existing staff to act as recruiters for the municipality.	✓		
1.3	Offer scholarships, bursaries and summer employment to local post-secondary students in return for future service as a municipal employee.	✓		✓
1.4	Target recruitment efforts within the local community by reshaping position requirements to fit the skills, capabilities and potential of available candidates.	✓		
1.5	Be more flexible in setting working conditions to attract staff.	✓		
2.	Looking In-house			
2.1	Support development and participate in a Municipal Internship Program-type program designed for existing municipal staff.	✓		
2.2	Facilitate access and the opportunity to take education and training programs that address difficult-to-acquire skill sets and that successful completion of these programs be rewarded.	✓		
2.3	Develop career paths for each employee in conjunction with a succession plan for the municipality.	✓		
2.4	Develop a municipal succession plan that addresses how key positions will be staffed into the future.	✓	✓	✓
2.5	Develop a strategy to retain the services of retiring employees.	✓		

Recommendation		Complexity Grouping		
Ref. No.	Description	Change in Practice	Significant Initiative	Requires Professional Help
2.6	Consider expanding the work season to enhance the probability of retaining seasonal employees.	✓		
2.7	Consider expanding opportunities for seasonal workers by offers of full-time employment supplemented by education and training.	✓		
3.	Resource Sharing and Alternative Service Delivery			
3.1	Enter into a formalized and systematic examination of regional service delivery with neighbouring municipalities.		✓	✓
3.2	Work with neighbouring municipalities to establish mentoring/training programs where an appropriately skilled resource is available to provide training.	✓		✓
3.3	Consider working with neighbouring municipalities to acquire scarce resources that would be shared among the participating municipalities.	✓		✓
3.4	Consider the potential for non-employment solutions for difficult-to-recruit or retain competencies.	✓	✓	✓
4.	Raising the Profile of Rural Municipalities			
4.1	Commit to a proactive and persistent participation in local schools' career day program.	✓		
4.2	Include recruitment of municipal workers in all promotional activities related to economic development and tourism.	✓		✓
4.3	Develop or enhance an existing careers section in the municipality's website.		✓	✓
4.4	Enlist the aid of employee spouses to participate in the promotion of the municipality as a "good employer" and the community as a "good community."	✓		
5.	Assessing the Need to Deliver Services			
5.1	Conduct a review of the services provided to the community to determine if all current service offerings and service levels are valued by residents.		✓	✓
6.	Re-examination of Position Qualifications			
6.1	Ensure that a demonstrated desire to live and work in a rural environment receives an equal or higher consideration than candidate qualifications.	✓		

Recommendation		Complexity Grouping		
Ref. No.	Description	Change in Practice	Significant Initiative	Requires Professional Help
6.2	Review personnel policies and practices that require minimum levels of education and experience to re-establish what are mandatory versus desirable qualifications.		✓	
6.3	Focus on recruiting the “family” during the recruitment process by offering to provide employment or employment services to the spouse or other family members.	✓		
6.4	Introduce flexibility in working conditions, subsidization or service provision to enhance recruitment and retention success.	✓		
6.5	Review the municipal minimum levels of certification to ensure that the municipality is meeting the minimum requirements, while at the same time, not exceeding them unnecessarily.		✓	
7.	Providing Access and Opportunity for Education and Training			
7.1	Actively work through AAMDC to access education and training appropriate for municipal employees.	✓		
8.	Addressing Competitive Compensation			
8.1	Review compensation packages on a regular basis, at least every three years, and compensation levels every one to two years, as appropriate.	✓	✓	✓
8.2	Consider supplementing compensation packages with added benefits that provide an incentive to become and remain a municipal employee.		✓	✓
8.3	Consider extending the benefit package to seasonal workers and part-time employees.	✓		
8.4	Actively promote the value of working where you live and the benefits of working for local government.	✓		

The need for professional help is a suggestion based on experience with these themes, while some may feel comfortable moving ahead on their own, others may wish to seek help in the initial stages to fashion an implementation plan.

8. BUILDING A PLAN FROM THE STRATEGIES

To get value from the recommendations, rural municipalities will need to reflect on the potential for making a material difference that each of the practices and initiatives offers. We suggest that rural municipalities follow a plan of action that is similar to the steps outlined in the following chart.

Chart 7.1 Action Plan Steps

1.	Pick the Practices and Initiatives that Will Work for You
2.	Determine the Priority for Implementation
3.	Assign Authority and Responsibility to Build the Plan
4.	Decide the Time Frame for Implementation
5.	Determine the Support You Require
6.	Publish Your Plan
7.	Act on Your Plan
8.	Review and Update Plan at Least Annually

Each municipality's plan will likely be unique. What you do and how you do it will be predicated on the resources you have available and the time frame you chose to act on the plan.

1. Pick the Practices and Initiatives that Will Work for You

It is unlikely that any one municipality could or should attempt to do everything that is presented in the recommendations chapter of this overall Strategy. For some, many of the suggested practices are already in place or have been tried in the past; for others, the potential benefit of attempting some suggestions may not be material or sufficient to offset the potential risks of creating labour unrest.

The first attempt at creating a list of initiatives should be based on the estimation that a benefit, regardless of any negative or downside potential, is potentially available to the municipality.

The second draft should then take into account the downside. When doing this, the municipality should consider what factors could possibly mitigate the downside and keep the initiative on the list. For example, evaluating the potential for delivering services on a regional basis may initially appear to be cost-prohibitive. However, provincial funding programs exist to offset major portions of the cost of doing this type of evaluation.

2. Determine the Priority for Implementation

Priority is usually driven by desirability or value of outcome or by "do-ability." "Do-ability" is typically the fact that little or no investment is required, there are no downside impacts to manage, or a practice is terminated rather than initiated.

Local priorities may dictate a different set of criteria for establishing implementation sequence. Regardless of the approach used, the important factor is to establish the order that initiatives will be conducted.

This compilation becomes, in effect, the municipality's own workable solutions.

3. Assign Responsibility and Authority to Build the Plan

Up to this point the municipality has decided what to do and when to do it. To give focus and life to the Strategy, the municipality should assign an individual project manager to prepare the Workable Solutions Implementation Plan.

The focus of the Plan is to lay out how all the practices and initiatives will be addressed.

4. Decide the Timeframe for Implementation

Deciding the timeframe has major implications on the resourcing required to complete the many tasks and actions called for in the Plan. While many organizations have the capacity and the need to plan for a twenty-year horizon, we suggest that this Plan be a maximum of five years and a target of three years.

5. Determine the Support You Require

Each component of the Plan will require some level of support, either financial or human, and estimating this support will be critical to the validity of the Plan and its ultimate support by council.

Major initiatives that require third-party help have been identified in the text of the recommendations.

6. Publish your Plan

Assuming the Plan has been approved by council, the Implementation Plan should be published to communicate the commitment the municipality has made to address labour force issues.

7. Act on the Plan

Taking action on the Plan and measuring progress and performance are obviously key steps to putting the strategy in place. Having published the Plan, the necessary follow-up step is to measure how well the municipality is accomplishing the targets of the Plan.

8. Review and Update Plan at Least Annually

Priorities change, environments change and the Implementation Plan will also need to change to keep pace with the world around it.

We suggest revisiting the Plan at least once a year to amend and update it.

APPENDIX A: GENERIC MUNICIPAL SERVICE FUNCTIONS

Generic Municipal Service Functions and Associated Staff Positions

Sources: AAMDC 2004 Salary Survey; AAMDC Municipal Employment Opportunities; three sets of MD & C Job Descriptions; other websites with municipal position advertisements.

Staff positions and descriptions are intended to be accurate but generic (i.e., descriptive of typical positions but not necessarily reflective of the precise responsibilities of any given position)

*Note: the "functions" column (grey shading) is the key level for identifying staffing and educational requirements. The "organizational units" are typical grouping of functions but these groupings may vary significantly from municipality to municipality. The "functions" level should be pretty stable regardless of location, at least for municipal organizations of roughly similar characteristics (i.e., predominantly rural vs. rural with significant urban centres vs. urban municipalities)

Typical Major Organizational Unit*	Typical Functions*	Description	Staff
Municipal Council			<i>[by legislation, all staff must report to the CAO; the CAO to Council]</i>
Chief Administrative Officer	General Municipal Administration		Chief Administrative Officer* Assistant CAO Sec'y to CAO* [Council Admin Assist]
	Communications	Information and public relations services	[Communications Coordinator] <i>[an emerging area with staff positions in some municipalities, probably dependent on how focused they are on tourism and economic development]</i>
Agriculture Services Board			<i>[Agricultural Services Employees are municipal but take direction from a Board.]</i>
Agricultural Services	Agricultural Support Services	Promoting and sustaining agricultural production through services related to weed control, pest control, shelterbelt program, stubble burning control etc.	Agricultural Fieldman * Assist. Agricultural Fieldman * Yardman [Brushing Crew Foreman] [Weed Inspector] Labourers (?)
	Environment and Conservation	Develop and administer municipal policies under various legislation to ensure sound farming and other practices related to the environment.	<i>[no identifiable staff amongst our sources but part of responsibilities of Agricultural Services]</i>
Public Works	Public Works Administration	Responsible for municipal transportation responsibilities,	Public Works Superintendent* Assist. Public Works

Typical Major Organizational Unit*	Typical Functions*	Description	Staff
		municipal utilities, and municipal buildings including planning, construction, contract management, maintenance and repair.	Superintendent.(?) [Technical Services Engineer] [Land Surveyor] Engineering Technologist* Public works office staff* Shop Foreman* Mechanic Welder Partsman Janitor/custodian*
	Roads	For roads under municipal regulation: road use agreements with major users, road construction, snow clearing, road maintenance and repair, brush clearing on roadsides.	Roads Foreman/Area Area Supervisor* [Infrastructure Coordinator] [Field coordinator - Roads] Gravel Foreman Gravel Checker * Equipment Operators* Labourers -Public Works Labourers - Other
	Utilities	Solid waste facilities and policies; garbage collection; sewage; water and waste water. [Note: there are Regional Landfill Commissions who hire their own staff and operate separately from municipalities]	[Utilities Foreman/Supervisor] Utilities Officer/Utilities Operator * Landfill Operator *
Planning and Development	Planning and Development	Land use planning and approval (for municipality's rural land base and its unincorporated settlements; business approvals; rezoning; development permits). [Note: some smaller municipalities run joint planning services with other municipalities]	Director of Planning and Development* Development Officer* Planner* Assistant Planner GIS/GPS Analyst/technician*
	Economic Development and Tourism	Active promotion of economic development and tourism? In AAMDC list	Economic Development/ Tourism Officer
Community Services	FCSS	Provincial/municipal cost shared programs providing promotion and intervention strategies in support of the social well-being of individuals or families.	Director of Community Services* FCSS Director* [FCSS Program Coordinator - Family Services] [FCSS Program Coordinator - Youth Services]
Parks and Recreation Board			

Typical Major Organizational Unit*	Typical Functions*	Description	Staff
	Parks and Recreation	Planning, development and operation of parks, camp grounds, and other recreation facilities under the control of the municipality. [Note: relatively few of these in rural municipalities; typically rec facilities are built by towns with financial contribution by counties and MDs]	Parks/Recreation Supervisor [Campground Coordinator]
Protective Services and Emergency Services	Protective Services	Provision of services relating to by law and legislation enforcement, traffic movement,	Director of Protective Services [Protective Services Coordinator]
	Special Constable Services	In cooperation with RCMP, protection of country road infrastructure, safe movement of traffic throughout the municipality and enforcement of Land Use Bylaw. Cooperation with local RCMP.	Special Constable* Bylaw Enforcement Officer*
	Emergency Services	Provision of fire and other emergency services; disaster planning; sometimes ambulance and 911 services.	Director of Emergency Services
	Fire/Rescue Services	Provision of (usually) multiple fire services throughout the municipality	Fire Chief* Deputy Fire Chief *
	Ambulance Services	Provision of ambulance services typically through separately incorporated services and often in cooperation with other municipalities. These are sometimes run by the municipality; sometimes one municipality will provide services to other municipalities.	Emergency Medical Technician Paramedic
	911 Service	Call answer and dispatch services [only some municipalities run this and may cover others]	911 Dispatch Supervisor
	Disaster Services and Management	Planning for emergencies and disasters; risk identification; coordination of services and management of disaster response.	<i>[Primarily planning and coordination function amongst various services; Disaster Plan is a legislated requirement with CAO,</i>

Typical Major Organizational Unit*	Typical Functions*	Description	Staff
			<i>typically, as control centre and Fire Chief on the ground]</i>
Corporate Services	Finance and Accounting	Financial planning, budgeting and accounting services to the municipality; tax calculation and revenue collection (based on assessment	Director of Finance/Controller* Accounting Manager/Finance Officer* Admin Assistant/Receptionist* Accounts Payable Clerk* Payroll Clerk Utilities clerk Accounts Receivable Clerk Records Management Clerk Assessment/Taxation Clerk*
	Assessment	Property assessment under provincial legislation;	Assessor
	Human Resources	[Recruitment, benefits administration, HR policies etc]	Manager, Human Resources Payroll/Human Resources Coordinator*
	Information Technology Services	[Planning and support services for information technology systems and hardware]	Information Systems Manager/ Coordinator* Systems technician*

APPENDIX B: QUALIFICATIONS AND CERTIFICATIONS MAP

Qualifications and Certifications Map

Blanks indicate that there is no indication of a specifically related certification or education provider.

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
		Degree in Business Administration	Four-year degree programs in business management delivered by 4 public universities (U of A, U of C, U of L, AU) and by several private accredited colleges. Flexible options by AU and U of L include a three-year degree (AU) and post diploma two-year business degrees (both). With the 2+2 arrangements, a business degree can be started at a wide variety of locations and completed either at U of L campuses or by distance education through AU. With recent authority granted to public colleges to deliver four-year degree programs, it is likely that the larger colleges and techs will also start delivering four-year commerce degree programs.	<ul style="list-style-type: none"> ▪ CAO ▪ Communications Coordinator ▪ Director, Community Services ▪ Director, Planning ▪ Director of Finance ▪ Accounting Supervisor
		Diploma in Business Administration	There are 10-12 business management diploma programs (typically 2 years) delivered by public colleges, technical institutes, and private accredited colleges. Several of these are delivered in multiple locations but likely on a rotational basis. Note option to cap 2 yr diploma with 2 yrs of university level study for a 4 yr degree.	<ul style="list-style-type: none"> ▪ Communications Coordinator ▪ Development Officer ▪ Accounting Supervisor
		Degree in Communications or Marketing	4 year undergraduate degrees in Communications are available at two Alberta universities (U of C, Athabasca University) with master level at a third (U	<ul style="list-style-type: none"> ▪ Communications Coordinator

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
			of A). Mt. Royal offers an Applied Degree in Communications. Marketing is typically a major within Commerce/Business Administration degrees and available at all four universities. Public Relations is not taught as a major at the degree level although there are a couple of diploma level programs (MRC, GMCC) and continuing education options.	
		Diploma in Communications or Marketing	Diploma programs in Communications are available at several colleges; the AU degree is designed to be a capstone (2 + 2) program built on a college diploma program.	<ul style="list-style-type: none"> ▪ Communications Coordinator
Canadian Public Relations Society (CPRS) is a federation of 16 province or city based associations. It provides national level professional certification for public relations practitioners. It has a national designation (<i>APR: Accredited Public Relations</i>) which requires a portfolio, 5 years of experience, a written and an oral examination.	The APR designation does not carry any formal educational requirements.			<ul style="list-style-type: none"> ▪ Communications Coordinator

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
Membership does not require the APR designation and the APR designation is not a requirement for practice.				
The International Association of Business Communicators (IABC) is an international professional organization for business communications practitioners (which overlaps with public relations and so competes with the CPRS). It has a designation, <i>ABC: Accredited Business Communicator</i> . The ABC is based on a varying combination of PS education and experience involving presentation of a portfolio plus written and oral examinations.	There are no specified educational requirements although a post secondary education is desirable.			<ul style="list-style-type: none"> ▪ Communications Coordinator
Society of Local Government	Awarding of the CLGM is based, in	Local Government Certificate (LGC).	The U of A's Faculty of Extension is a key provider (since 1938) of certificate studies	<ul style="list-style-type: none"> ▪ CAO ▪ Director,

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
Managers (SLGM) is the professional accreditation association for municipal managers with the protected CLGM designation. <i>“Certified Local Government Manager.”</i>	part, on the educational services provided by the U of A, Faculty of Extension.	This is the Alberta designation but is interlocked with the NACLAA, national program. National Advanced Certificate in Local Authority Administration (NACLAA). Levels I and II. Senior Executive Fellows Program (SEFP)	aimed at local government managers. The UA’s LGC and NACLAA programs (Level II) or SEFP programs are the educational basis for the CLGM designation. The LGCP is a Alberta based certificate program in local government administration; a variety of similar programs are offered by post secondary institutions across the county. The NACLAA is a two level, nationally recognized certificate program developed jointly between the U of A and Dalhousie which offers greater depth but allows for advanced credit for those who have taken provincial certificate programs including LGCP. LGCP equals Level I of the NACLAA.	<ul style="list-style-type: none"> ▪ Infrastructure ▪ Director, Community Services ▪ Director, Planning ▪ Protective Services Coordinator ▪ Director, Finance ▪ Accounting Supervisor
		Certificate in Municipal Management and Leadership (CMML)	U of A, Faculty of Business, offers a leadership certificate program which is intended to build on the LGC and NACLAA programs. It also offers three advanced credits towards the Public Administration specialty of the MBA program.	<ul style="list-style-type: none"> ▪ As above
		Degree in Agriculture	The U of A offers a longstanding B.Sc. in Agriculture; the U of L offers a 4 year program (either BA or BSc depending on the emphasis) in Agricultural Studies which includes a post- diploma route for holders of approved agriculture diplomas.	<ul style="list-style-type: none"> ▪ Agricultural Fieldman
		Degree in Environmental Studies	Environmental studies programs may be differently focused on environmental science, on environmental conservation, reclamation and protection/enforcement,	<ul style="list-style-type: none"> ▪ Agricultural Fieldman

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
			and on management of the environment. 4 year B.Sc. degrees in environmental sciences are offered by the U of A, the U of C, Concordia University College and Kings University College. The U of A also offers a Conservation focused B.Sc. and the U of L offers a post-diploma BSc. Lakeland College and Lethbridge Community College also offer Applied degrees in Environmental Management and Enforcement respectively.	
		Diplomas in Environmental Studies	2 year environmental technology diplomas are offered by Lakeland, Keyano, NAIT, SAIT and Olds Colleges; 1 yr certificate programs by LCC and MRC. These may transfer in whole or in part to the U of L.	<ul style="list-style-type: none"> ▪ Agricultural Fieldman
		Diploma in Agriculture	2 year diploma programs in agricultural technology are offered by several rural/regional colleges including Lakeland, Olds and Lethbridge CC.	<ul style="list-style-type: none"> ▪ Agricultural Fieldman ▪ Assist. Agric. Fieldman
Application of commercial pesticides is regulated by Alberta Environment in line with national standards. Applicator Pesticide applicators are certified by Alberta Environment. The Pesticide Applicator	Application and train the trainer courses are provided by Lakeland College Olds, NAIT and Lethbridge CC in cooperation with AE based on national standards; available in distance education mode. Trainer certification			<ul style="list-style-type: none"> ▪ Agric. Fieldman ▪ Assist Agric. Fieldman

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
<p>Certification Program is a collaborative effort between AE and Lakeland College including Home Study materials, classroom tutorials and a certification exam. Exam is mandatory but can be challenged without the coursework</p>	<p>requires five years' experience.</p>			
<p>Cert in Pest and Nuisance Control (Form 7) (also referred to as Predator Control Device permit); pest and nuisance control is regulated through Alberta Agriculture under the Agricultural Pests Act.</p>	<p>Agricultural fieldmen are automatically designated as Inspectors under the Agricultural Pests Act. The minister has to designate "pests." Form 7 is a permit to trap or poison a coyote or a skunk under regulations to implement the Agricultural Pests Act. The Form 7 permit is issued by Alberta Agriculture (AAF) authorizing an</p>			<ul style="list-style-type: none"> ▪ Agric. Fieldman

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
	<p>individual to use restricted toxicants and devices issued by the Dept. All Form 7 licensees are employed by either AAF or municipalities. Permit holders must receive individual training from a Department specialist and attend an AAF training course.</p>			
	(see above)			<ul style="list-style-type: none"> ▪ Agric. Fieldman
<p>WHMIS (Workplace Hazardous Materials Information System) is a cooperative, national communication system for identifying and handling hazardous material in the workplace. Various Federal acts define hazardous materials and labeling and information requirements. Provincial OH & S legislation defines</p>	<p>Worker WHMIS education is a critical part of the system; requirements are defined in the Alberta Occupational Health and Safety Code.</p>		<p>Providers of WHMIS training may include private training companies and employer designed courses that cover the requirements. An example would be courses offered by the Alberta Construction Safety Association (ACSA).</p>	<ul style="list-style-type: none"> ▪ Agric. Fieldman ▪ Assist. Agric. Fieldman ▪ Roads Foreman ▪ Assistant Roads Foreman ▪ Utilities Operator ▪ Parks/Recreation Supervisor

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
employer and employee responsibilities.				
APEGGA designation Professional Engineer (P.Eng.)	P.Eng based on acceptable four-year degrees in engineering plus experience.	Degree in Civil Engineering	APEGGA requires a 4 year degree in Engineering plus 4 years experience. Core providers are Engineering programs at Universities of Alberta and Calgary.	<ul style="list-style-type: none"> ▪ Director, Infrastructure ▪ Technical Services Engineer
ASET/CCTT designations [see chart below] <ul style="list-style-type: none"> • Certified Engineering Technologist (CET) • Registered Engineering Technologist (R.E.T.) 	Programming towards these certifications are provided by public and private post secondary institutions certified by CCTT including DeVry, Lethbridge CC, GPRC, NAIT and SAIT.	Diploma in Civil Engineering	Diploma technologist programs are provided by more than the ASET/CCTT accredited institutions but membership in ASET of graduates is not required under Alberta legislation [see ongoing scope of practice dispute with APPEGGA]	<ul style="list-style-type: none"> ▪ Director, Infrastructure ▪ Technical Services Engineer ▪ Roads Foreman ▪ Assistant Roads Foreman ▪ Engineering Technologist ▪ Utilities Supervisor ▪ Planner
Alberta Infrastructure: Class B Bridge Inspection Certificate is part of Alberta Infrastructure's Bridge Inspection and Maintenance system which includes levels of bridge inspection certification.	Class A requirements include civil engineering degree plus two years' experience; civil engineering technology diploma plus 3 years experience; or equivalent combination plus specified training, inspection training and examination.			<ul style="list-style-type: none"> ▪ Engineering Technologist

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
	Class B is limited to “standard bridges and culverts” and only requires High School, completion plus course work, inspection training and monitored inspection work experience; certification is by a three-member committee.			
APEGGA designation • Professional Engineer (P. Eng)	P.Eng based on acceptable 4 year degrees in engineering plus experience.	Degree in Environmental Engineering	APEGGA requires a four-year degree in Engineering plus four years’ experience. Core providers are Engineering programs at Universities of Alberta and Calgary. U of C offers a four-year degree in environmental engineering. [note: U of A incorporates environmental topics and has graduate specialization in environmental engineering but not, apparently, an undergraduate specialization in this field.]	<ul style="list-style-type: none"> ▪ Director, Infrastructure ▪ Technical Services Engineer
Highway Construction Survey [note: it is not clear what was required here; experience in basic road surveying may be all the foreman position requires although	Land surveyor is a regulated profession in Alberta requiring certification through the Canadian Board of Examiners for Professional Surveyors (and its	NAIT, SAIT and Olds College provide two year geomatics technology programs. The U of C provides a B.Sc. in geomatics engineering.	At a basic introductory level, see also, for example, the introduction to surveying provided by the Alberta Roadbuilders and Heavy Construction Association.	<ul style="list-style-type: none"> ▪ Technical Services Engineer ▪ Roads Foreman

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
conceivably the Technical Services Engineer could be a certified Land Surveyor.]	provincial affiliate, Alberta Land Surveyors Association); this is based on a minimum of 2 years of post secondary training or a 4 year university degree in survey engineering; a set of examinations and a two articling period with a certified surveyor is required. Exemptions from exams may be granted for four-year university programs in survey engineering. There is also a geomatics technologist option which only requires a two-year diploma; accreditation is provided by the Alberta Association of Mapping and Surveying Technologies (ASSMT)			
Highway	.		Continuing education courses are offered	▪ Technical Services

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
Construction Materials Testing			by NAIT and SAIT on construction materials testing. These are also part of their civil engineering technology programs	<ul style="list-style-type: none"> Engineer ▪ Roads Foreman ▪ Assistant Roads Foreman
First Line Supervisory Skills Course			Courses of this nature are widely delivered by a variety of public and private providers. For example, Grant MacEwan College (now simply 'MacEwan') offers "The Art of Supervision".	<ul style="list-style-type: none"> ▪ Technical Services Engineer ▪ Roads Foreman ▪ Assistant Roads Foreman
OHS for Front Line Supervisors; AHMSA provides three levels of OHS training for municipalities: Recognized Municipal Health and Safety Advisor; Municipal Supervisor in Health and Safety; Municipal Joint Health and Safety Committee Representative.	Courses provided by Alberta Municipal Health and Safety Association (AHMSA) and the Alberta Construction Safety Association (ACSA) amongst others			<ul style="list-style-type: none"> ▪ Technical Services Engineer ▪ Utilities Supervisor ▪ Utilities Operator
Small and Heavy Equipment Operator			Keyano offers a longstanding introductory 8 week certificate program for Heavy Equipment Operators. However, although this program used to provide training specifically in skills related to road construction, the program now focuses on introductory level skills for use in the oil sand, predominantly in driving large scale	<ul style="list-style-type: none"> ▪ Roads Foreman ▪ Assistant Roads Foreman ▪ Utilities Supervisor ▪ Utilities Operator

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
			<p>trucks used in oil sands operations.</p> <p>Olds College is also in the process of establishing a heavy equipment introductory course for Southern Alberta.</p> <p>The Alberta Road Builders and Heavy Construction Association offers an introduction to various aspects of their core activities aimed at introducing newcomers but it is expected to be followed by on the job training in equipment operation.</p> <p>None of these programs offer an opportunity to train for specific municipal needs like grader operators. As things stand, on the job training in a road building or maintenance operation is about the only route available although one of these introductory programs would be a useful starting point.</p> <p>Crane and Hoisting Operator is another somewhat related trade under the Apprenticeship and Industry Training system.</p>	
<p>ASET membership; [see chart below] ASET/CCTT designations</p> <ul style="list-style-type: none"> • Certified Engineering 	<ul style="list-style-type: none"> • ASET’s national organization (CCTT) accredits some but not all Alberta P.S. institutions 	<p>Diplomas in civil engineering technology</p>	<ul style="list-style-type: none"> • Two (plus) year diploma programs in engineering technologies are offered by a wide variety of Alberta public and private colleges and technical institutes. The key providers are NAIT and SAIT. 	<ul style="list-style-type: none"> ▪ Roads Foreman ▪ Engineering Technologist

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
Technologist (C.E.T.) Registered Engineering Technologist (R.E.T.)	delivering Diplomas in Engineering Technology.			
Operation of water and waste water facilities in Alberta is a regulated occupation in Alberta with mandatory certification of W/WW operators by Alberta Environment. AE specifies the level of certification for each facility: Water and Waste Water Levels 1, 2, 3 and 4. Prior to attempting examinations, candidates must complete mandatory entry level training only provided by AWWOA. AE defines the requirements and conducts regular examinations for all levels. Operators	Coursework is certified by AE through Certified Education Unit status for specific courses. The primary provider is the Alberta Water and Waste Water Operators Association whose courses are available in many locations. Other providers whose courses have been recognized include AE itself, ACSA, AMHSA, AWWA, a number of p.s. institutions (NAIT has a W/WW program), a range of employer courses (notably Strathcona, Edmonton and Calgary), a range of		Only NAIT offers a Water and Waste Water program but a number of post secondary programs have courses which have been assigned CEU status by Alberta Environment.	<ul style="list-style-type: none"> ▪ Utilities Supervisor ▪ Utilities Operator

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
must also be registered members of AWWOA and AWWA.	private company or supplier courses, Western Canada W/WW Association correspondence and seminars/ workshops etc			
Confined Space Entry	Provided by Alberta Municipal Health and Safety Association (AHMSA) and the Alberta Construction Safety Association (ACSA) amongst others			<ul style="list-style-type: none"> ▪ Utilities Supervisor ▪ Utilities Operator
Introduction to Solid Waste	SWANA coursework in accordance with AE certification processes.			<ul style="list-style-type: none"> ▪ Utilities Supervisor
		Dip in Mechanical Engineering	Two-year diploma programs in Mechanical Engineering Technologies are available from NAIT and SAIT.	<ul style="list-style-type: none"> ▪ Utilities Supervisor
		Diploma in Chemistry, Biology or Environmental Studies	<p>Two-year diploma programs in Chemical Technology and Chemical Engineering Technology are offered by NAIT and SAIT.</p> <p>Two-year environmental technology diplomas are offered by Lakeland,</p>	<ul style="list-style-type: none"> ▪ Utilities Supervisor

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
			Keyano, NAIT, SAIT and Olds Colleges; 1 yr certificate programs by LCC and MRC. These may transfer in whole or in part to the U of L.	
Landfill Operator Designation. Landfill and Compost certification is mandatory to operate landfill sites in Alberta. Level of certification depends on the nature of the site. AE establishes standards and defines levels for Landfill Operators.	There is no mandatory coursework and a CEU system does not exist. SWANA and others provide coursework acceptable for AE certification. Canadian Composting Council has useful publications. Candidate landfill operators use these and other sources to prepare for AE examinations.			<ul style="list-style-type: none"> ▪ Landfill Manager
Licensed to perform Commercial Vehicle inspections	As part of their system for enforcing safety standards for commercial vehicles, Alberta Infrastructure and Transportation licenses private facilities (typically repair and maintenance	Journeyman Heavy Duty Mechanic	<p>Heavy Equipment Technician is an apprenticeship trade; SAIT has a 1 year Heavy Equipment Technician program and NAIT (Fairview) a two-year Heavy Equipment Service diploma program.</p> <p>Lethbridge Community College offers a three-month program to train commercial vehicle inspection and enforcement officers.</p>	<ul style="list-style-type: none"> ▪ Shop Foreman/Mechanic

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
	<p>operations) to conduct inspections under the Commercial Vehicle Inspection Program. The department also issues licences to individuals to be “Vehicle Inspection Technicians” based on training and experience. Applicants have to hold an appropriate Alberta trades certification, i.e., typically auto or heavy equipment mechanics and must apply to the department for licencing.</p>			
<p>Certification to practice not required; designation as an “Alberta Community Planner” is protected and membership is required in the Alberta Association, Canadian Institute of Planners</p>	<p>Minimum requirement is a four-year degree, which may include degrees not related to planning, plus experience in the planning field.</p>		<p>Degrees in Urban geography or Urban studies (U of A, U of C or U of L) usually precede a Masters degree in planning. Only the U of C offers the latter in Alberta; a number of master level planning degrees are offered elsewhere in Canada. Degrees in urban geography or urban studies plus experience are possible options as well as degrees in civil engineering and architecture. See also ALUP program below for a route which</p>	<ul style="list-style-type: none"> ▪ Director of Planning ▪ Development Officer

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
			could combine any degree with a one year planning program.	
		Applied Land Use Planning Certificate Program (ALUP)	Developed and delivered by U of A, Faculty of Extension; this is a certificate program which provides basic requirements to understand and carry out municipal planning. It does not qualify anyone for Alberta Community Planner designation.	<ul style="list-style-type: none"> ▪ Director of Planning ▪ Development Officer
		Diploma in Land Use Planning	There do not appear to be any college level diploma programs in planning in Alberta; this may be reference to ALUP or non-Alberta programs	<ul style="list-style-type: none"> ▪ Director of Planning ▪ Development Officer
		Degree in Planning	Degrees in Urban geography or Urban studies (U of A, U of C or U of L) usually precede a Masters degree in planning. Only the U of C offers the latter in Alberta; a number of master level planning degrees are offered elsewhere in Canada.	<ul style="list-style-type: none"> ▪ Director of Planning ▪ Planner
		Degree in Geography	Degrees in Urban geography or Urban studies (U of A, U of C or U of L) usually precede a Masters degree in planning. Only the U of C offers the latter in Alberta; a number of master level planning degrees are offered elsewhere in Canada. See also ALUP above	<ul style="list-style-type: none"> ▪ Planner
		Degree in Architecture	The only architecture degree in Alberta is the 3+ year M.Arch from the U of C which required a prior undergraduate degree.	<ul style="list-style-type: none"> ▪ Planner
		Diploma in Community Services	There are a variety of two year diploma programs in such areas as Conflict Resolution, Community Wellness as well as diploma programs focused on Child and Youth Care; two year diploma	<ul style="list-style-type: none"> ▪ Director of Community Services

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
			<p>programs in Social Work are also offered by several colleges (GMCC, MRC, Northern Lakes, Portage, RDC, MHC. Successful completion plus experience can lead to Social Worker designation in Alberta (unlike most other provinces which now require a degree; this is likely to change over the next few years as the profession attempt to upgrade minimum requirements)</p>	
<p>No provincial recreation oriented certification process per se (the Alberta Association of Recreation of Facility Personnel (AARFP) offers a variety of short courses in a program structure aimed at the operator of recreation facilities)</p>		<p>Degree in Recreation</p>	<p>A 4 year degree program is offered by the University of Alberta; four year applied degree programs in Ecotourism and Outdoor Leadership are offered by Medicine Hat</p>	<ul style="list-style-type: none"> ▪ Director, Community Services ▪ Parks/Recreation Supervisor
		<p>Diploma in Recreation</p>	<p>College and Mount Royal College. Diploma programs in recreation are offered at GPRC, Lethbridge CC.</p>	<ul style="list-style-type: none"> ▪ Parks/Recreation Supervisor
<p>These positions do not require a registered social worker which is a protected designation in Alberta.</p>	<p>See next columns</p>	<p>Degree in Social Work</p>	<p>Only the U of C, Faculty of Social Work, is presently authorized to deliver undergraduate and graduate degrees in social work. A number of colleges provide diploma level programs which is still satisfactory for practice and designation as a social worker: GMC, MRC, MHC,</p>	<ul style="list-style-type: none"> ▪ Director, Community Services ▪ FCSS Supervisor

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
To be registered as a social worker in Alberta, a minimum of a 2 year college diploma in social work is required. Pressure exists to require an undergraduate or graduate degree in social work but not yet agreed.			Portage, Northern Lakes, RDC.. Most diploma programs can be used as a recognized step towards the U of C degree program; a few colleges (Keyano, Kings University College) also offer formal transfer programs which probably get more credits at the U of C. As noted above, the environment for social worker registration and the educational requirements are likely to change in the near future.	
To be registered as a social worker in Alberta, a minimum of a 2 year college diploma in social work is required. Pressure exists to require an undergraduate or graduate degree in social work but not yet agreed.		Diploma in Social Work	A number of colleges provide diploma level programs which is still satisfactory for practice and designation as a social worker: GMC, MRC, MHC, Portage, Northern Lakes, RDC. Successful completion plus experience can lead to Social Worker designation in Alberta (unlike most other provinces which now require a degree; this is likely to change over the next few years as the profession attempt to upgrade minimum requirements)	<ul style="list-style-type: none"> ▪ FCSS Supervisor ▪ Outreach/Program Coordinator ▪ Youth Services Coordinator
		Diploma in Human or Volunteer Services	There are a variety of two year diploma programs in such areas as Conflict Resolution, Community Wellness as well as diploma programs focused on Child and Youth Care; two year diploma programs in Social Work are also offered by several colleges (GMCC, MRC, Northern Lakes, Portage, RDC, MHC. Successful completion plus experience can lead to Social Worker designation in	<ul style="list-style-type: none"> ▪ FCSS Supervisor ▪ Outreach/Program Coordinator

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
			Alberta (unlike most other provinces which now require a degree; this is likely to change over the next few years as the profession attempt to upgrade minimum requirements)	
Volunteer Board Development Certificate	Alberta Tourism, Parks, Recreation and Culture operates the Board Development Program to support not-for-profit boards in the area of governance. Included is a training program for instructors who then deliver short courses for volunteers			<ul style="list-style-type: none"> ▪ FCSS Supervisor ▪ Outreach/Program Coordinator
		Diploma in Youth Services	Several public colleges deliver two year programs in Child and Youth Care including Lakeland, Lethbridge Medicine Hat and Mount Royal colleges. Grant MacEwan College delivers a four year Bachelor of Child and Youth Care degree.	<ul style="list-style-type: none"> ▪ Youth Services Coordinator
		Diploma in Law Enforcement	Diploma programs in law enforcement are offered by a number of public providers including Grant MacEwan, Lethbridge and Medicine Hat colleges. One year certificates are offered by both public and private providers. (Norquest College, CDI College of Business, Technology and Health Care, Columbia College)	<ul style="list-style-type: none"> ▪ Campground Coordinator ▪ Protective Services Coordinator ▪ Special Constable

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
		Diploma in Emergency Management	There are no post secondary programs that deal directly with this topic. However, Alberta Municipal Affairs and Housing delivers a series of courses in emergency management.	<ul style="list-style-type: none"> ▪ Protective Services Coordinator
		Degree in Criminal Justice	Diploma programs in law enforcement are offered by a number of public providers including Grant MacEwan, Lethbridge and Medicine Hat colleges. One year certificates are offered by both public and private providers. (Norquest College, CDI College of Business, Technology and Health Care, Columbia College)	<ul style="list-style-type: none"> ▪ Special Constable
Training in Fire			Two colleges offer fire service programs: Lakeland delivers Fire Service Training (4 wks to 24 wks); Lethbridge CC delivers Fire Investigation and Fire Service Administration certificate programs. Portage College delivers a Wildland Firefighter program.	<ul style="list-style-type: none"> ▪ Protective Services Coordinator
Special Constables are approved by Alberta Solicitor General's dept on application from a designated employer.	Applicants are expected to have completed the Special Constable Training Program of the ASG's Staff Training College or an equivalent commercial program			<ul style="list-style-type: none"> ▪ Special Constable
Joint Health and Safety Committee Course	AHMSA, amongst others, delivers this course			<ul style="list-style-type: none"> ▪ Special Constable

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
AMHSA certification				
National Academies of Emergency Dispatch. Emergency Medical Dispatch and Emergency Fire Dispatch				<ul style="list-style-type: none"> ▪ 911 Dispatch Supervisor
Alberta College of Paramedics (ACP) Emergency Medical Responder certification				<ul style="list-style-type: none"> ▪ 911 Dispatch Supervisor ▪ Emergency Medical Technician
1. NFPA (?) 2. NRPA (?) Firefighter certification at various levels		Certificate programs in fire fighting, investigation and prevention	Two colleges offer fire service programs: Lakeland delivers Fire Service Training (4 wks to 24 wks); Lethbridge CC delivers Fire Investigation and Fire Service Administration certificate programs. Portage College delivers a Wildland Firefighter program.	<ul style="list-style-type: none"> ▪ Fire Chief ▪ Deputy Fire Chief
The Alberta Safety Codes Council provides an array of safety codes officer certifications related to different industries or services in support of the Alberta Safety Codes For fire safety, there	For fire related safety codes, courses are delivered by Lakeland College through its fire education centre "fire-etc". Some courses are available on line			<ul style="list-style-type: none"> ▪ Fire Chief ▪ Deputy Fire Chief

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
<p>are seven levels The National Fire Prevention Association (US) also has certifications and standards that are used as models in Alberta and these certifications are sometimes requested by rural municipalities.</p>				
<p>Although practice as an accountant is not restricted, "Chartered Accountant" is a protected professional designation under the Alberta Institute of Chartered Accountants</p>				<ul style="list-style-type: none"> ▪ Director, Finance ▪ Accounting Supervisor
<p>Although practice as an accountant is not restricted, "Certified General Accountant" is a protected professional designation under the Certified Management Accountants of</p>				<ul style="list-style-type: none"> ▪ Director, Finance ▪ Accounting Supervisor

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
<p>Alberta</p> <p>Although practice as an accountant is not restricted, "Certified Management Accountant" is a protected professional designation under the Certified General Accountant Association, Alberta only granted after passing CMA examinations</p>		<p>A university degree including specified courses is required as a basis for the CMA</p>		<ul style="list-style-type: none"> ▪ Director, Finance ▪ Accounting Supervisor
<p>Appraisal Institute of Canada (AIC). AIC offers a two-level designation which includes the Canadian Residential Appraiser (CRA) designation and the Accredited Appraiser Canadian Institute (AACI) designation.</p>				<ul style="list-style-type: none"> ▪ Assessor
<p>Accredited Municipal Assessor of Alberta (AMAA), a designation provided by the Alberta Assessors</p>		<p>Lakeland College Business Administration Diploma with a major in Appraisal and Assessment</p>	<p>Lakeland College diploma program in Business Administration with major in appraisal.</p>	<ul style="list-style-type: none"> ▪ Assessor

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
Association (AAA) including acceptable post secondary training, experience and an oral examination.		and the University of British Columbia Diploma in Urban and Land Economics are approved programs that meet the following core education requirements.		
		Local Government Course in Taxation	University of Alberta Extension, Local Government Program	<ul style="list-style-type: none"> ▪ Assessment/ taxation Clerk
		Diploma in Human Resource Management	Diploma programs in human resource management are offered by GMC, Keyano and Lakeland Colleges	<ul style="list-style-type: none"> ▪ Manager, Human Resources
		Degree in Human Resource Management	Degree in human resource management and labour relations are offered by the University of Lethbridge and Athabasca University	<ul style="list-style-type: none"> ▪ Manager, Human Resources
CHRP	CHRP (Certified Human Resource Professional) is a designation offered through the Human Resource Professional Association of Ontario and available to Albertans. The designation is awarded to members who have a post secondary			<ul style="list-style-type: none"> ▪ Manager, Human Resources

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
	degree (not necessarily in HR), who have specific HR training, and who successfully pass association exams.			
		Certificate in payroll and benefits admin	Several private vocational schools and at least one public college (MRC) offer certificate programs in payroll and payroll management. Shorter ones (25 weeks) focus on payroll issues directly; longer ones 40-50 weeks) focus on both payroll and computerized payroll systems	<ul style="list-style-type: none"> ▪ Payroll/HR Coordinator
	MCP (Microsoft Certified Professional) and MCSA (Microsoft Certified System Administrator) are designations of proprietary Microsoft training for people responsible for operating Microsoft products and systems	Typically, persons applying for this certification will have had prior post secondary training in information technology.		<ul style="list-style-type: none"> ▪ Systems Coordinator ▪ Computer Technician
		Degree in IT	4 year Bachelor degrees in Computing Science and Computer Engineering are offered by the University of Alberta and the University of Calgary. A wide variety of other qualifications are also available depending on the emphases in the	<ul style="list-style-type: none"> ▪ Systems Coordinator

Certifications and Certifying Bodies	Certification Training Providers	Educational Credential	Education providers	Associated Positions
		GIS/GPS Diploma program	<p>position.</p> <p>Public colleges and technical institutes offer a range of educational programs from short course introductory GIS programs, short course specializations (aspects of GIS), at least one 2 year diploma (Olds), a Bachelor of Applied Technology, Geographic Information (SAIT) of 2 years on top of a recognized 2 year diploma program and a four year BSc in Computer Science and Geographical Information Science (U of L).</p>	<ul style="list-style-type: none"> ▪ GIS/GPS Technician
		Alberta Municipal Internship is a management focused internship program available to rural and urban municipalities.	Participation is offered to municipalities by Alberta Municipal Affairs. Based on the fact that a majority of CAO's will leave the field in the next 10-15 years, the program targets the development of the next generation of municipal administrators. It is intended to attract recent post-secondary graduates to municipal administration. In 2007-8 there are expected to be 15 interns in different host municipalities. The program lasts 12 months with basic salary and benefits being paid by the program. Orientation for interns and mentors and workshops provided for interns during the intern period.	<ul style="list-style-type: none"> ▪ All Management Positions

Note 1: There are a few widely available skill certifications (at one or more levels) that are required in addition to the above that have not been included because they are easily and widely obtainable:

1. First Aid and CPR
2. Driver's Licences at various levels

Note 2: Note the interrelationship between formal qualifications and certifications and years of specific experience. Except where qualifications are mandatory (e.g. regulated occupations like water technicians or supervisors of water facilities), lower qualifications

APPENDIX C: REGIONAL SERVICE DELIVERY CHARTER

REGIONAL SERVICE DELIVERY CHARTER

REGIONAL PARTNERSHIPS

Introduction

Regional partnerships offer municipalities an opportunity to be more efficient and effective in the delivery of municipal services. In some cases services that are too costly to be delivered by individual municipalities may be realized by achieving economies of scale through participation with one or more partners who also require the service.

Purpose of this initiative

This initiative is intended to evaluate the potential for regional partnerships that will result in cooperative agreements to deliver services on a regional basis. At the end of the initiative, the individual municipalities will be in a position to make an informed decision to either proceed with implementation or to not participate.

Approach

This initiative should proceed in four stages as detailed below:

Stage 1 – Agreeing to examine the potential benefits of regional service delivery.

This stage requires a meeting of potential participants in the evaluation of a regional service delivery partnership. Leadership is required to set the stage for conducting this session. Participants at the meeting should include representatives of the respective councils and their CAOs.

The agenda for this session should be brief and to the point. It should focus on bringing all participants to the same level of understanding of why a regional partnership for service delivery is potentially desirable and in the best interests of the region.

The primary result of the meeting should be to reach agreement that an evaluation should be done to identify more clearly what benefits will accrue to the participants. Organizationally, a committee should be formed with representatives of all participating municipalities.

Stage 2 - Setting a vision, mission and guiding principles

The first task of the committee will be to determine a vision, a mission and a set of guiding principles that will be applied throughout the initiative. These three themes are fundamental to having all participants have the same concept in mind while the initiative is being conducted.

Sample of a Regional Partnership Vision Statement:

REGIONAL PARTNERSHIP VISION STATEMENT

The Regional Partnership is XXX independent municipalities, working as one unified community of interests to provide a desired level of services at an affordable price to the partner municipalities. Cooperation and collaboration take many different forms to ensure the most cost efficient and effective means of delivering service is used.

The partnership is committed to the future, while at the same time, recognizing the realities of today.

template

The example provided above highlights the collaborative approach being taken by the partners to achieve a unified community of interest in the most cost-effective and efficient means.

Sample of a Regional Partnership Mission Statement:

REGIONAL PARTNERSHIP MISSION STATEMENT

The Regional Partnership proactively identifies, develops and implements projects and programmes of regional service delivery that are of economic and social benefit to the partner municipalities. The partnership will determine the optimal means of governance, planning, managing and delivering services on an initiative-by-initiative basis to ensure the maximum benefit is derived from each opportunity.

The outcome of the partnership will contribute positively to the quality of life in the partner municipalities and will support growth and development throughout the greater region.

template

The example focuses on the proactive identification of benefits for the participating municipalities and supports growth and development through the greater region.

Sample of a Set of Guiding Principles:

Guiding Principles

1. Governance of the Partnership is vested with the elected councils of the three municipalities
2. All partners will appreciate and respect the diverse needs and capabilities of the individual partners
3. Individual municipalities will determine their level of service needs and associated financial participation on a service-by-service basis
4. Planning for regional services is a priority and will be carried out collaboratively on an ongoing basis
5. A documented and agreed upon process will be used to identify, evaluate and agree on participation in individual, regional service initiatives
6. Regionally provided services will be delivered in accordance with formal agreements that will address governance, funding and relevant delivery details
7. All municipal services can be evaluated by the Partnership
8. Municipal staff are valued resources in the Partnership and key to the success of the partnership

Partnership cannot be assumed ...
it must be spelled out

template

The message delivered in the guiding principles is that partnership requires the participants to think through the concept and then turn the concept into reality for the participants.

Having worked through a draft of the vision, the mission and the guiding principles, the committee should bring the participating councils back together and present their results. The purpose of this session is to ensure that councils are aware of where this initiative is going and what principles it is proceeding under.

The vision, mission and principles should be endorsed by each council before proceeding to the next stage.

Stage 3 - Evaluating Municipal Services

The ideal situation is for all municipalities to agree that all municipal services (see attachment) are on the table and will be subject to evaluation.

To conduct the evaluation the committee must determine what factors are important to them as a municipality and what weight should be given to each of the factors in the evaluation.

Sample of an Evaluation Matrix for a Single Service

EVALUATION SCORES											
MUNICIPALITY 1			MUNICIPALITY 2			MUNICIPALITY 3					
COST REDUCTION	1		COST REDUCTION	1		COST REDUCTION	1				
COST AVOIDANCE	1		COST AVOIDANCE	1		COST AVOIDANCE	1				
COST DISPLACEMENT	2		COST DISPLACEMENT	2		COST DISPLACEMENT	2				
REVENUE GENERATION	0		REVENUE GENERATION	0		REVENUE GENERATION	0				
SERVICE NOT PREVIOUSLY PROVIDED	3		SERVICE NOT PREVIOUSLY PROVIDED	3		SERVICE NOT PREVIOUSLY PROVIDED	3				
HIGHER VOLUME OF SERVICE	1		HIGHER VOLUME OF SERVICE	1		HIGHER VOLUME OF SERVICE	1				
HIGHER QUALITY OF SERVICE	3		HIGHER QUALITY OF SERVICE	3		HIGHER QUALITY OF SERVICE	3				
REDUCES RISKS	0		REDUCES RISKS	0		REDUCES RISKS	0				
RELATIONSHIP BUILDING	2		RELATIONSHIP BUILDING	2		RELATIONSHIP BUILDING	2				
COMPETITIVE GAIN	0		COMPETITIVE GAIN	0		COMPETITIVE GAIN	0				
LONG TERM VIABILITY	1		LONG TERM VIABILITY	1		LONG TERM VIABILITY	1				
MUNICIPALITY 1			MUNICIPALITY 2			MUNICIPALITY 3					
DO-ABILITY	3		DO-ABILITY	3		DO-ABILITY	3				

In this example, three municipalities picked 12 factors that they believed were important to them in evaluating regional service delivery. They then ‘scored’ each of the municipal services independently to highlight the benefit to their municipality. The scoring ranges from 0, or no benefit, to 3, the highest level of benefit. In this example, the municipalities were evaluating a regional FCSS service.

The last factor, “do-ability”, or ease of implementation, was a guess on the part of the participants about how easy it would be to implement a regional service. In this example, FCSS was seen as a relatively easy service to regionalize.

Sample of the Evaluation Score Compilation:

REGIONAL PARTNERSHIP			
	SCORE	WEIGHT	TOTAL
COST REDUCTION	1	9	9
COST AVOIDANCE	1	7	7
COST DISPLACEMENT	2	9	18
REVENUE GENERATION	0	5	0
<hr/>			
SERVICE NOT PREVIOUSLY PROVIDED	3	8	24
HIGHER VOLUME OF SERVICE	1	5	5
HIGHER QUALITY OF SERVICE	3	6	18
REDUCES RISKS	0	7	0
<hr/>			
RELATIONSHIP BUILDING	2	9	18
COMPETITIVE GAIN	0	9	0
LONG TERM VIABILITY	1	8	8
<hr/>			
TOTALS		246	107
DO-ABILITY	3	51	153
TOTAL		399	260

In compiling the score for each service, the committee agreed on a weighting for each evaluation factor. The average score was then multiplied times the weighting factor to get a total score for each factor. The sum of the factors gave the total score for the service.

This approach provides a mechanistic means of evaluating each municipal service in terms of what benefits are expected from regionalization.

Stage 4 - Implementing the initiatives

Implementation becomes a series of separate initiatives involving individual groups of participants carrying out the activities necessary to regionalize services. Before getting to that point the committee goes through a process of determining how best to achieve regional service delivery for each service in play.

The committee looks at each highly-scored service and assesses how best to cooperatively deliver the service and adhere to the guiding principles outlined earlier. These recommendations can range from simple agreements to significant undertakings to establish commissions, authorities or boards, or to establish not-for-profit or for-profit companies.

Once an implementation plan has been developed, the recommendation is taken back to the individual councils for ratification and sign-off.

Implementation committees are then formed and charged with the responsibility to implement the solutions.

Work-Plan and Schedule

<i>ID</i>	<i>Task Name</i>	<i>Duration</i>
	Stage 0 - Preparation	3w
	Stage 1 - Gaining Agreement	4w
	Stage 2 - Setting Vision, Mission and Guiding Principles	6w
	Stage 3 - Evaluating Services	8w
	Stage 4 - Implementation	50w

The above chart provides a ratio of the number of weeks that are typically required to accomplish the tasks associated with conducting an evaluation of regional services. The timeline associated with implementation will vary dramatically from situation to situation and the 50 weeks are presented for illustration purposes only.

Attachments

List of Municipal Services

1. Protective

- 911/emergency dispatch
- Fire and emergency service equipment
- Fire and emergency service personnel
- Fire code, bylaw and related statute enforcement
- Ambulance
- Disaster services
- Policing
- Weed control
- Bylaw enforcement
- Animal control

2. Public

- Potable water
- Waste water treatment
- Solid waste management
- Road construction:
 - engineering services
 - technical services
- Road maintenance:
 - engineering services
 - technical services
- Fleet/equipment:
 - maintenance
 - rental
- Building maintenance
- Energy
- Communications (e.g., SuperNet)

- Recycling
- Environmental management

3. Community

- Facilities and parks management:
 - scheduling
 - maintenance
 - operation
- Recreation program delivery (sports, library, etc.):
 - program development
 - management
 - delivery
- Social program delivery (FCSS, housing, transit, etc.):
 - program development
 - management
 - delivery
- Cultural program delivery (museums, cultural facilities, etc.):
 - program development
 - management
 - delivery
- Economic development and tourism
- Cemeteries
- Airports

4. Administration

- Purchasing/inventory management
- Accounts receivable
- Accounts payable
- Taxation
- Payroll
- General ledger
- Financial reporting
- Human relations
- Public relations and communications

- Risk management/insurance
- Labour
- Health and safety
- Information technology
- Licenses
- Bylaw development
- Legal services

5. Assessment and Planning

- Assessment services
- Inter-municipal development plans
- Municipal development plans
- Development control
- Permitting

6. Governance Related

- Lobbying/advocacy
- Regional promotion

APPENDIX D: MUNICIPAL SERVICES REVIEW CHARTER

MUNICIPAL SERVICES REVIEW CHARTER

INTRODUCTION

A municipal services review offers municipalities an opportunity to rationalize the types of services and the level of service delivery. Municipal services tend to evolve over time as municipalities react to the changing needs of their residents. In many cases existing services remain in place without periodic reassessment of their value.

PURPOSE ON THIS INITIATIVE

This initiative is intended to examine each municipal service using a set of criteria that distinguishes between legislated or mandated services and voluntary or discretionary services. For discretionary services, a determination is made to either to continue or terminate delivery of the service. As well, the evaluation will further examine both mandated and retained discretionary services to establish an appropriate level of service.

APPROACH

This initiative should proceed in five stages as detailed below:

Stage 1 – Prepare Inventory of Municipal Services

This stage requires that all current municipal functions be examined to determine what business processes are being used to perform work. This examination results in a series of high-level flowcharts that identifies the service being performed as an output and the resources consumed (human, fixed assets, equipment, and financial).

Services typically fall into two functional categories: value-delivering services and value-enabling services. Value-delivering services are ones where the output or service is provided directly to rural municipal stakeholders, for example, road maintenance. Value-enabling services are those which support value-delivering services, for example, accounts payable cheque preparation.

The results of this type of analysis are summarized into a matrix that looks like Figure 1, *following*:

Figure 1. Services Matrix

Value Delivering Service	Value Enabling Service
Road Maintenance	AP Cheque Preparation

Stage 2 – Classify Services as Mandatory or Voluntary

This stage involves a series of tasks that lead to the development of another two-dimensional matrix for service. The question as to what are mandatory and what are voluntary or discretionary services may vary depending upon how wide-ranging the review is to be. That is, if the municipality wants to examine all services regardless of what is being performed then the mandatory category will contain only legislated requirements. On the other hand, if some services are a given and will only be subject to a service level review, then the mandatory category will have a longer list. Figure 2, Revised Services Matrix (*following*), is the new summary that results.

Figure 2. Revised Services Matrix

	Value Delivering Service	Value Enabling Service
M A N D A T O 'R Y		
V O L U N T A R Y	Road Maintenance	AP Cheque Preparation

Stage 3 – Determine Which Discretionary Services are Needed

This stage involves examining each service identified in the bottom two quadrants of the revised service matrix using a set of agreed upon criteria. The criteria may consist of a variety of different themes, including:

1. **Service Usage** – the degree to which residents make use of a particular service.
2. **Service Value** – the cost of service provision compared to the number of people using the service and the value to them.
3. **Sole Provider** – the lack of any other providers of a service make this service non-discretionary.

The means to conduct the analysis will vary depending upon the types of criteria chosen. Cost-based criteria obviously require a costing algorithm that allocates direct and indirect resource consumption to individual services.

Value analysis will likely include some survey activity with users of the service and so on. The level of rigor applied to the development of criteria is directly proportional to the credibility of the analysis.

Stage 4 – Set Service Levels for Remaining Services

The analytical work carried out in the previous stage presents insights into what level of service is required. This demand should be tempered by an assessment of what service level the municipality wants to provide and/or can afford to provide. Additional insights are typically warranted at this point and it will be useful to examine what other rural municipalities have set as service levels for specific services. This information can typically be gathered by informal or formal surveys depending upon how far afield the survey will extend.

The implementation of service level changes (especially those which are cut back) can sometimes provoke a negative response from those impacted by the change. In some cases it may make sense to phase the introduction of changes over a period of time to lessen the impact on those directly affected.

Stage 5 – Monitor Service Usage

Having made changes and having gone through the process of establishing what criteria should be used to assess services, it makes sense to continue to monitor services to determine if further action is necessary or desirable. Conditions change and the demand for services, as we have seen, continues to evolve.

Work-Plan and Schedule

<i>ID</i>	<i>Task Name</i>	<i>Duration</i>
	Stage 1 - Inventory Municipal Services	2w
	Stage 2 - Classify Services	1w
	Stage 3 - Determine Needed Discretionary Services	2w
	Stage 4 - Set Service Levels	4w
	Stage 6 - Monitor Service Usage	0w

The above chart provides a ratio of the number of weeks that are typically required to accomplish the tasks associated with conducting an evaluation of municipal services. The timeline associated with implementation (set service levels) will vary dramatically from situation to situation and the four weeks are presented for illustration purposes only.

APPENDIX E: SALARY SURVEY MATERIALS

Overview

Name: _____

Contact: _____

Benefits:	✓	Employer %	Employee %
Employee Pension Plan			
Alberta Health Care			
Dental:			
- basic			
- restorative			
Long Term Disability (LTD)			
Accidental Death & Dismemberment (AD&D)			
Life Insurance			
Employee Assistance Program (EAP)			

Unionized shop? yes no

When were the scales last set? _____

When are they to be reviewed? _____

Expected scale increase (%) _____

Position Specific Benefits

Please indicate below which positions, if any, are associated with the following benefits:

(Please check (✓) **ALL** if all positions are entitled to this benefit)

<i>Benefit</i>	<i>Specific Positions Only</i>
1. Unrestricted personal use of an employer vehicle or a vehicle paid for a leased employee	All? <input type="checkbox"/> Specific Positions:
2. Car allowance	All? <input type="checkbox"/> Specific Positions:
3. Registered Retired Savings Plan (RRSP) contribution	All? <input type="checkbox"/> Specific Positions:
4. Education assistance—job-related	All? <input type="checkbox"/> Specific Positions:
5. Education assistance—not job-related	All? <input type="checkbox"/> Specific Positions:
6. Golf club membership	All? <input type="checkbox"/> Specific Positions:

Position Specific Benefits (Cont'd)

Please indicate below which positions, if any, are associated with the following benefits:
 (Please check (✓) **ALL** if all positions are entitled to this benefit)

<i>Benefit</i>	<i>Specific Positions Only</i>
7. Other sports or fitness club memberships	All? <input type="checkbox"/> Specific Positions:
8. Performance-related bonus	All? <input type="checkbox"/> Specific Positions:
9. Attendance or longevity bonus	All? <input type="checkbox"/> Specific Positions:
10. Paid sabbaticals	All? <input type="checkbox"/> Specific Positions:
11. Paid time off for professional association participation	All? <input type="checkbox"/> Specific Positions:
12. Other Benefits (please name): _____ _____ _____ _____	All? <input type="checkbox"/> Specific Positions:

Other Benefit Questions

13. What is your policy on overtime? _____

14. What positions are **NOT** eligible for overtime? _____

15. What is your vacation entitlement policy?
_____ days after _____ years
_____ days after _____ years
_____ days after _____ years
_____ days after _____ years
_____ days after _____ years

16. Do you offer a “flex-time” or compressed work week program?

Yes No

17. If Yes, how does the program operate?

18. What is your standard work week for:

a) Salary Personnel _____ Hours

b) Wage Personnel _____ Hours

c) Other:
_____ Hours

Salary and Wage Questions

On the following pages are a series of questions regarding specific employment positions with the Municipality. In answering the questions, please use the following outline to frame your response:

- Your Job Title: Use the job title of the position you are using as a comparison.
- Reports To: Indicate the job title of the position being reported to.
- Degree of Match (%): Enter the percentage that best indicates how closely alike this position and the one from your organization match up.
- Number of Incumbents: Indicate the number of people.
- Pay Range \$ Min: If you have a minimum and a maximum for this position
\$ Max please state them.
- Actual Salary Range: Indicate the actual salary or wage for the person who has this position or the average actual salary/wage if there is more than one person in this position.
- Hours Worked/Week: Please indicate the official number of hours in the work week for this position. Please do not enter actual hours worked.
- Unionized Position Y/N: Please indicate yes or no if this is a union position.

Job Title: Municipal Manager Your Job Title: _____
 Reports To: Council Reports To: _____

<i>Position Description</i>
<p>Summary:</p> <ul style="list-style-type: none"> Performs the duties and functions, and exercises the powers assigned to the chief administrative officer by legislative enactment in the Province of Alberta. <p>Supervisory responsibility:</p> <ul style="list-style-type: none"> Supervises the Manager of Finance, Manager of Corporate Services, Manager of Human Resources and the Executive Secretary. Supervisory duties include training, budgeting, performance appraisals, coaching, mentoring and monitoring tasks. <p>Major duties and responsibilities:</p> <ul style="list-style-type: none"> Provide leadership and direct the management group and staff in the pursuit of Council objectives, policies, programs, and planning documents. Advises and informs Council on the operations and affairs of the municipality. Acts as liaison with boards or committees of Council, commissions, agents, and consultants. Act on feedback from Council, Ratepayers, Government to ensure the highest standards are attained for an effective and efficient delivery of Municipal Services. Directs the preparation of capital and operating budgets for submission to Council for approval. Responsible to ensure that policies and programs of the municipality are implemented. Attend all regular and special meeting of Council and other meeting as requested by Council. Responsible to ensure that Council minutes are recorded and distributed in accordance with the Municipal Government Act. <p>Qualifications/education/experience:</p> <ul style="list-style-type: none"> Class 5 driver's license. Post secondary education in administration, commerce, business or a combination of equivalent education and experience. A minimum 7 years experience in a local government setting or senior management level required. <p>Skills required:</p> <ul style="list-style-type: none"> Proficiency Excellent verbal and written communication and public relations skills. Ability to interact well with, and respond to inquiries from employees, management, council and the ratepayers. Excellent supervisory skills. Must be able to maintain strict confidentiality. Must be self-motivated, and able to work with little or no supervision. Ability to prioritize and manage time constraints with Microsoft Word, Excel and PowerPoint.

Degree of Match (%): _____

Number of incumbents: _____

Pay range: \$ Min: _____

\$ Max: _____

Actual Salary/Wage: _____

Hours Worked/Week: _____

Unionized Position? Yes No

Job Title: Executive Assistant Your Job Title: _____
Reports To: Municipal Manager Reports To: _____

Position Description

Summary:

- Responsible for maintaining municipal files, and for ensuring compliance with the Freedom of Information and Privacy Protection Act, and for providing assistance to the AAMD&C Northern District.

Major duties and responsibilities:

- Responsible for maintaining the General Filing System and Land Files.
- Ensure filing is accurately and promptly kept up to date, on an ongoing basis.
- Responsible for the accurate maintenance of the General File Guide.
- Responsible for recording appropriate file numbers on all M.D. mail prior to distribution.
- Prepare the M.D. Newsletter.
- Act as primary F.O.I.P. contact.
- Review and disclose information only in accordance with the F.O.I.P. Regulations.
- Provide administrative assistance to the AAMD&C Northern District.

Qualifications/education/experience:

- Grade 12.
- Minimum of 3 years experience in an office environment.

Skills required:

- Ability to interact well with, and respond to inquiries from employees, management, council and ratepayers.
- Excellent telephone and verbal skills.
- Proficiency with Microsoft Word, Publisher and Excel.
- Must be able to maintain confidentiality.
- Must be self-motivated, and able to work with minimal supervision.

Degree of Match (%): _____
Number of incumbents: _____
Pay range: \$ Min: _____
\$ Max: _____
Actual Salary/Wage: _____
Hours Worked/Week: _____
Unionized Position? Yes No