



# ORGANIZATIONAL AUDIT RESULTS

TOWN OF CALMAR

JUNE 7, 2021



STRATEGIC  
STEPS  
INC

The contents of this report were created for Calmar Town Council in spring 2021,  
with the betterment of the community in mind.

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## 1 Executive Summary

Strategic Steps Inc. was asked to provide insight into the Town of Calmar's service delivery; in particular into whether the Town is meeting the needs of its residents, the businesses that operate there, and the community organizations that provide benefit to the people of Calmar and beyond.

This is an audit rather than a full organizational review. Essentially this means that the process looks for that proverbial smoke to indicate where there might be fire. In those cases, the audit would recommend a deeper review of the particular areas where more attention would provide value.

Overall, the Town appears to be providing the services that are required. As with any audit of this sort, there are areas we recommend spending more time or putting some consideration into changes.

Calmar's vision is: *Calmar, we are a welcoming community and regional leader. The ideal place to call home and grow a business.* We took this as the ultimate expression of success for the Town and conducted this audit with that vision as the desired end some years from now. All efforts should be focused on achieving this vision, or more properly, efforts that do not work towards the vision should be stopped or at least very thoughtfully considered.

We did not encounter contra-visionary work going on in any large scale in Calmar, but there are some issues that ought to be addressed. Council can consider whether they agree and whether it is worth applying resources to these areas of potential gaps.

The gaps can roughly be divided into two main areas, internally-facing, and externally-facing.

### Internally Facing Gaps for Council's Consideration

- **Legislative Comprehensiveness** – Do Council's levers of Bylaw, Policy and Budget reflect the current will of Council and direction for the Town?
- **Organizational Structure** – is the Town set up with the right lines of accountability?
- **Role Clarity** – Does everyone from Council to the front-lines understand how they can best contribute to the Town's success?

### Externally Facing Gaps for Council's Consideration

- **Regional Agreements** – Are there ways that Calmar can deliver greater efficiency along with other municipal partners?
- **Service Levels** – Is the right amount of specific programs and services being provided?
- **Service Types** – Is the Town providing what is required by those who live in Calmar?

If Calmar makes no changes, it will still be operating in accordance with provincial legislative requirements, but there is room to improve. Starting at the top, with enabling legislation like bylaws and policies, Council can gradually work to ensure that Calmar continue to provide what makes Calmar a place to move to and a place to remain.

## 2 Background

Through the spring of 2021, Strategic Steps Inc. was engaged by the Town of Calmar to engage in an organizational audit. This process was designed to provide an external view of the governance, management, and service delivery of the Town in lieu of completing a full-scale organizational review. The antecedent to the engagement was desire expressed by Town Council to understand whether the Town corporation is designed to deliver what the citizens, business, and community organizations that call Calmar home requires. Much of this is laid out in the Town's 2020-2024 Strategic Plan.

The difference between the audit and review is that the audit is designed to identify where there might be issues that require a deeper review. This prevents a wholesale review exercise that is both quite disruptive to the operation of the Town and fairly expensive.

The results of the audit are contained in the pages that follow. The review team has looked at the Town's lines of service, its facilities, and the roles of the individuals who comprise the Town's staff. We have commented on all of these and we compare them to what we would expect to see in a well-functioning municipality in Alberta.

### 2.1 Process

Through a series of 18 interviews that comprised all elected officials, the Town Manager, and most Town staff, the review team has gained insights into what each individual thinks works well in Calmar, and where there could be improvements. Each person was asked a similar set of questions to both identify themes across the organization and to provide some anonymity to any particular person's comments. The list of interview questions is included as Appendix 1.

This audit was conducted during the COVID-19 pandemic, and all efforts were provided virtually and remotely. Tours of Town facilities would have been helpful; however, they are not critical at this stage. Should Council choose to engage in a deeper Organizational Review in one or more areas of Town operations, some in-person work would most likely be required.

The interviews were augmented with a review of Town documentation, particularly governance-type documents that included bylaws and policies. While a cross-section of these documents was reviewed in depth, the full registers of bylaws and list of policies was also reviewed, and comments appear later in this report.

An Organizational Review would dig deeper into more operational documentation required to safely run a Town's operations and remain in compliance with provincial and federal regulatory authority.

The bulk of this audit report is divided into three sections over the following pages:

- **The Well Functioning Local Government** (section 3): This identifies what we would expect to see in a local government in Alberta that is providing what is required to the people of the community while abiding by external and internal legislative requirements.

- **Calmar's Situation** (section 4): This is what the review team encountered through the review process in Calmar. This is the real picture of how well Calmar operates in a variety of areas.
- **Recommendations** (section 5): In some functions, there is a gap between the ideal situation and Calmar's situation. A set of recommendations are provided to address to those gaps. Some of the recommendations are significant, while most are a way of tweaking structures and performance to narrow any gaps between the ideal and Calmar's reality.

In most instances, the gap between the well-functioning local government and what is encountered in Calmar is not great and it can be addressed over time with conscious effort and encouragement from member of Town Council.

## 3 The Well Functioning Local Government

### 3.1 Legislation

Local governments in Alberta have oversight provided from the Government of Alberta through several Acts and many Regulation. Since local government is the exclusive domain of the provinces and territories under the Canadian Constitution, it is the provinces that have created municipal institutions across the country.

While there are nuanced differences from jurisdiction to jurisdiction, the general purposes of local governments – whether they be cities, towns, villages, municipal districts, or other entities in Alberta, are stated in Section 3 of Alberta's *Municipal Government Act (MGA)*. That statute defines the purposes of a local government in Alberta.

#### **Municipal purposes**

**3** The purposes of a municipality are

- (a) to provide good government,
- (a.1) to foster the well-being of the environment,
- (b) to provide services, facilities or other things that, in the opinion of council, are necessary or desirable for all or a part of the municipality,
- (c) to develop and maintain safe and viable communities, and
- (d) to work collaboratively with neighbouring municipalities to plan, deliver and fund intermunicipal services.<sup>1</sup>

Everything any municipal government provides in Alberta must ultimately lead to fulfilling one of the mandates expressed in these municipal purposes.

Below the provincial order of government, all municipalities are expected to have a series of publicly available bylaws and policies. These two instruments are available to meet obligations put on local governments by the Province, or to indicate local desire to deal with issues in a specific, predictable way. The MGA speaks to the powers associated with bylaws as follows:

#### **Guides to interpreting power to pass bylaws**

**9** The power to pass bylaws under this Division is stated in general terms to

- (a) give broad authority to councils and to respect their right to govern municipalities in whatever way the councils consider appropriate, within the jurisdiction given to them under this or any other enactment, and
- (b) enhance the ability of councils to respond to present and future issues in their municipalities<sup>2</sup>

Policies are designed to provide predictability to local government and can be updated as required by Council. Whereas it takes three readings to enact, change, or

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<sup>1</sup> Government of Alberta *Municipal Government Act*, RSA 2000 Chapter M-26, September 1, 2020, section 3

<sup>2</sup> Ibid, section 9

repeal a bylaw; a policy can be changed with a single majority vote of Council, making them somewhat easier to keep current than bylaws are.

Bylaws and policies are public documents and must be made publicly available.

Policies can be either related to governance or to administration of a municipality. To that end, a local council may have a register of governance policies, and the municipal administrator may oversee a suite of administrative policies. The latter set of documents are not Council's documents to change; however, they must not contradict any statute or legislation enacted by a higher order of government, including the municipality's council.

Under the concept of legislative paramountcy, no municipal bylaw or policy may contradict any provincial or federal legislation. If it does, the municipal statute is considered void, but only to the extent of the contradiction. The rest of the bylaw or policy will remain in effect. In cases like this, it is incumbent on the local government to alter its bylaw or policy so that it comes into compliance with the provincial or federal statute.

## 3.2 Governance

### 3.2.1 Bylaws and Policy

A well functioning local government operating under Alberta's MGA would be expected to have a full suite of bylaws and policies that both met statutory requirements and anticipated the needs of the community.

These documents would be generated as required, modified as necessary, and rescinded or repealed when no longer needed. They would be listed in one or more registers or lists of bylaws or policies.

These documents would be securely stored, yet publicly available. As more and more local government documents are moved online, it is conceivable that all bylaws and policies might too eventually all reside online.

A wise practice is for the local government to review all the policies that pertain to governance at least once per electoral term, acknowledging that municipalities could conceivably have more policies than can reasonably be expected to be reviewed every four years.

While some bylaws and policies are required by statute, not all are. Most policies for example are an anticipation of or reaction to local needs or events or define the way that municipal staff will carry out particular duties.

#### **Bylaws**

Bylaws are the strongest tool that the local government has. Bylaws are reserved for, as is stated in the MGA, providing "*broad authority to councils and to respect their right to govern municipalities in whatever way the councils consider appropriate...*"

Some bylaws, such as a CAO Bylaw are required by provincial statute, while many others are generated because of local needs, such as bylaws that create terms of reference for Council's standing committees.

Bylaws need to be written clearly because future councils and the public of the community will be bound by them until they are changed or rescinded.

## **Policies**

Ideally, all policies should be structured in a similar fashion, with a header that includes the name of the policy, a unique number for that policy, a date when it was initially created, and dates when it was reviewed and perhaps updated, and when it is to be next reviewed.

Policies have three fundamental purposes:

- a) Identify the municipal position on a topic of relevance so the municipal management does not have to pose the same question to Council over and over. An example of this could be a policy on recognizing staff for long-term service. Staff will regularly pass five year increments of employment (for example) with the municipality.

Council could be asked each time how that person should be recognized by the municipality, or Council could pass a policy that states how the recognition for five years' service will be done.

- b) Anticipate action that could be taken if a particular circumstance or situation comes to pass. Training on emergency management is such a policy topic. In this case, the municipality hopes that the topic is never needed, but it is prepared, nonetheless.
- c) Policies may minimize exposure to liability. For example, if a policy states that all Stop signs will be inspected twice a year and repaired or replaced as required, then it may be more difficult to successfully sue the municipality for damages incurred in an accident that occurred when a driver didn't stop at an intersection where a Stop sign wasn't visible or had been stolen.

If records indicated that the sign was in place, in good repair and clearly visible at the last inspection, then the municipality could demonstrate that they weren't aware of the deficiency and might therefore avoid being held liable for the damages incurred.

### **3.2.2 Council**

A municipal council is a group of people who are elected to represent the breadth and depth of their hometown. They are the 'minders' of the Town on behalf of the residents who live there. Their job is to act as overseers and care takers while the rest of the people contribute in their own ways.

The individuals on council are each other's 'first team'. The voters brought them together and provide them resources to make the best decisions possible. By the nature

of their work, they will often have access to more information than other people, and therefore know more about the goings on with the municipality than anyone else does – including their partners. They are entrusted with confidential information that is used to make decisions, and which is intended to remain confidential.

Councils need to think strategically and to focus. To that end, they will identify what success looks like for their community a generation from now, and they will generate a path to get there. While no council may bind a future council, prudent groups of elected officials will create a strategic plan for the course of their terms and beyond. This plan will outline what council wants to have done in terms of outcomes it wants to generate that will leave the community better off than when it was inherited. This plan will focus on an achievable number of priorities every year, knowing that council can not be all things to all people and do everything that everybody wants. The plan and the priorities are then provided to the municipal management to carry out and report on from time to time.

Under Canada's council-manager system of government and within Alberta's MGA, the elected representatives must hire an individual to manage the affairs of the Town on a daily basis. That person, the Chief Administrative Officer (CAO), in turn hires other experts to manage various aspects of the municipal government. In this way, council can focus on governing, while management can focus on managing the municipality and providing services that citizens, businesses and community organizations need.

Councillors are colleagues, but not necessarily friends. They govern through tools like bylaws, policies, and budgets, and they have their own ideas on how to make the community better. Votes are taken on changes that are to be made. Every decision, whether to add a service, modify one, or remove it, is a 'political' decision in that council must make a choice from between competing options.

A council will rarely have 'all' the information, so it makes the best decisions it can based on the information available at the time. It is inevitable that at some point a council decision that seemed sound when it was adopted by Council, may seem questionable at a later date if circumstances have changed or if more information arises that wasn't available when the decision was made.

This doesn't necessarily mean that Council made a mistake at the time, only that they now have a new situation to consider. If things have changed, Council can always revisit the matter and may have opportunities to either change an earlier decision or make new ones to address the new situation.

### **3.2.3 Committees**

It is common for a council to ask a smaller group, or a more diverse group, to assist with the governing of the Town by providing advice to council. In cases like this, standing or *ad hoc* agencies, boards, or committees (ABCs) are established and provided with a terms of reference that includes direction, and resources to carry out the job.

Committees can be made up of Council Members, members of the public, or combinations of the two. Sometimes these committees will be asked to recruit or

consult with outside representatives to assist with the work if it requires a breadth of experience or expertise that may not be present on council or amongst other committee members

Typically, council committees do not have decision-making ability, but may often make recommendations, and must refer the final decision to council itself. Standing committees are typically enacted through a municipal bylaw, whereas *ad hoc* committees or task forces are only created to exist until the accomplishment of a specific task or for a defined period of time. They are generally expected to be shorter-term in duration, or to have less authority, and may be established by policy.

### **3.2.4 Intermunicipal Relationships**

Within the municipal purposes outlined in the MGA, there is a reference to “*working collaboratively with neighbouring municipalities.*” This is a relatively new purpose under the Act and it is intended to outline that no municipality is an island; each is adjacent to at least one other municipality and must, by default, interact with that municipality.

As the leaders of the community, the responsibility to manage intermunicipal relationships falls to council. This may mean the provision of services that are of benefit to more than one community may be considered collaboratively, and it may mean that elected officials from those municipalities share common views that can be advocated to other orders of government.

By communicating with neighbouring municipalities, either council-to-council or administration-to-administration, municipalities can learn from each other and may find ways to improve their operations. And furthermore, by working together collaboratively, alternative models for service delivery may be found where facilities, equipment, staff, or other resources could be shared. This is especially true for relatively smaller municipalities who may not have a large enough staff to justify having some specialized types of expertise or skills available in-house.

In some other provinces in Canada, the provincial governments have mandated a minimum population for a municipality to exist at all. This has led to former independent municipalities being consolidated into one until the minimum threshold is reached. This has not happened in Alberta; however, the province has mandated that local governments collaborate – or say why they can’t collaborate - on the delivery of a range of services. The variety of municipal services that are collaboratively or individually delivered by a municipality should be described in the relevant Intermunicipal Collaboration Framework(s) and may be considered in Municipal Development Plans (MDP).

## **3.3 Management**

### **3.3.1 Structure**

If the governance aspects of a municipality are the head of the beast, then the body is the management of the local government. To function effectively, the management and administration of any municipality must be connected and work together seamlessly. While there are core responsibilities that any organization must carry out –

like meeting payroll, ensuring insurance is current, and keeping bills paid, the administration of the Town is designed to fulfill the wishes of council.

The CAO is ultimately responsible to council. That person is the narrow point in the hourglass, with citizens and council above, and managers and staff below. To best determine how to carry out the will of council, the CAO retains a series of subject matter experts. Typical practice is for the CAO to have between two and four direct reports. Any more than that and the business of managing people takes away from the business of managing the municipality.

As goes the CAO, so goes the next layer of management. Referred to as 'Directors', in Calmar, the people who manage specific functional areas typically have between three and five direct reports. That enables these Directors to collaborate with the CAO and think strategically, while their direct reports often carry out the business of the municipality. Inefficiencies begin to creep in when there are too many direct reports.

An example of a typical reporting structure is shown here.

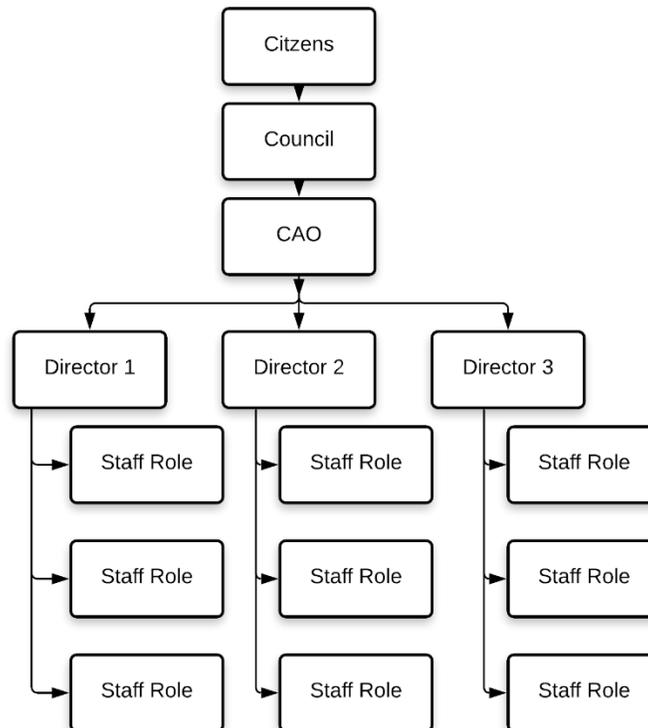


Figure 1 - Theoretical Typical Organizational Structure

### 3.3.2 Reporting

As currently depicted in the Town's organizational chart, there are five levels of organization between the CAO and the Arena Operators. This number of levels is not common for a municipality with the staffing complement of a community the size of Calmar. However, just because it isn't typical doesn't mean that it is necessarily a problem.

If it is determined that this number of levels is appropriate, one thing to keep in mind is that when there is a greater number of levels in a reporting structure, there may be a greater need for a more structured set of protocols for how direction flows down through the levels. If an organization behaves more informally in this regard, there is a danger that front line staff could be getting direction from multiple people above them in the organization. This is obviously a problem if directions from different sources are contradictory, and at the very least it can make it difficult for front-line staff's immediate supervisor to manage their time and workloads if they are also responding to direction from their supervisor's superior(s) that might keep them from addressing their assigned tasks and duties.

Job titles and brief role statements need to be indicative of the role or responsibilities assigned to the position and must be applied consistently. It has been noted that the Town's organizational chart currently shows the Arena Lead Hand reporting to the Public Works Lead Hand. Normally the fact that both of these positions are 'Lead Hands' would indicate that the two positions are roughly equivalent in responsibility level and compensation. If this is true, it might be more appropriate to have both of the Lead Hand positions reporting directly to the Public Works Foreman. If these positions' responsibility and compensation levels are not similar, then it would be more appropriate to rename either one or both of the positions to better reflect that.

### **3.3.3 Human Resource Management**

The management of people is an important consideration for organizations of any size. There are specific laws that must be followed and practical considerations and precedents that define best practices in this field. Certainly, as an organization grows in size, the organizational structure may become more complex and when there are more people, inevitably, there are more interpersonal interactions that lead to more complexity in how efficiently the organization runs. The way that a municipality manages its human resources can either help or hinder the achievement of organizational goals.

Leading human resource practices for municipalities include the implementation and monitoring of systems to deal with these five categories: staffing, development, compensation, health and safety, employee/employer and labour relations. This could include some or all of the following:

- a suite of policies to define expectations for staff behaviour and relationships
- defined benefits and privileges, and procedures for accessing them
- defined classification levels and associated levels of compensation within each classification level (a salary grid)
- a system of annual performance reviews that include:
  - individual plans that establish expectations for the upcoming year
    - may include a personal plan for professional development and training
  - an evaluation of the past year's performance based on the plan made the previous year

- succession planning
- a code of conduct for staff
- a defined process for dealing with human resource complaints
- a defined process for appeals
- definitions for what actions warrant disciplinary action, and the types of discipline that may be applied.
- policies and procedures for recruitment, training, development, discipline, and termination of staff

As human resource management is a complex area of expertise, it is important that a municipality has access to somebody with specific training, knowledge and expertise. That person (or persons) could be somebody already within administration, who either devotes all of their time to HR matters, or does this in addition to other areas of responsibility. Alternatively, this expertise could be provided by an outside expert via contract or addressed collaboratively with one or more other municipalities.

### 3.3.4 Finance

## 3.4 Service Delivery

It is common in relatively smaller municipalities for one person to be responsible for the delivery of more than one type of service. As organizations become larger, usually more people will specialize on fewer, or perhaps only one, type of service. For example, in some of the smallest municipalities in Alberta, there may only three employees – the CAO, the 'inside person' and the 'outside person'.

The inside person will typically be responsible for office management, accounts payable and receivable, addressing resident concerns and correspondence, and may also handle a specialized area such as referrals to local FCSS or some financial administration tasks. The outside person will typically be responsible for all public works matters, including snow clearing, parks maintenance and the operation of utility systems.

The CAO will be responsible for such things as budgeting, council agendas, policy and bylaw development, contract management, and management of the other two staff.

Because so few people are responsible for so many things, each of them is a generalist that needs to be competent in many things but doesn't have the time available to become an expert in all of them. As a municipality grows, so too does the volume of work to be done to deliver all the same services. When more staff are hired to address the increased service demand, staff will tend to be less generalists and have a greater focus on a smaller scope of responsibility. This becomes an opportunity to increase the level of expertise within the municipal organization.

Which areas a growing municipality develops specialization in can be due to many factors, such as existing in-house expertise, availability of certain types of expertise in the local labour market, or strategic decisions about which services to expand based on either resident desires or Council priorities.

### 3.4.1 Review of Services

It is prudent for a municipality to conduct a regular review of the services that it provides to its residents, businesses and visitors. This review should address the services currently provided, whether they are being delivered in a way that meets expectations or require improvement. If they require improvement, this will require a consideration of what additional resources might be required to get to the desired level of service. Those additional resources could include staff, equipment, facilities, funding, or a combination of these. The review might also result in a decision to intentionally increase a service level – to do something more frequently, or to do it better – or might lead to a decision to either reduce a service level or discontinue the provision of a particular service. If there is a desire to introduce a new service to the community, the service level review might be a good time to add this to the conversation.

Ideally, a service review will be consistent with a Council's established priorities, and will be used to subsequently guide administration's development of the annual budget and their own management business plan.

### 3.4.2 Service Types

The business of running a municipality is made up of the running of a number of different programs and services. There are different ways to categorize or group those individual services, and those groupings are often reflected in how the municipal organization is structured, and who is responsible for the delivery of each service.

One common way to group services is into the broad categories of 'hard services', 'soft services' and 'corporate services'. Hard services (sometimes called Municipal Services) typically include such things as public works, engineering, utilities, facilities and fleet, whereas soft services (or Community Services) include services that are generally provided to people, like FCSS, recreation, library, community events, and municipal enforcement. Corporate services usually include services that are provided to municipal staff or to keep the municipal corporation going. These include finance, assessment, taxation, information technology, human resources, legislative services, legal services, corporate strategic planning, insurance and risk management, purchasing and communications. Some services such as planning and development and economic development have been included in either the hard services or soft services areas, or in some cases, they have been separated into their own category.

If a municipality assigns responsibilities for service delivery based on the groupings of Municipal Services, Community Services and Corporate Services, it would generally follow that there would be one person responsible for each of those service areas. Each of these positions would have a job title of Director (or Manager in some communities) and would report to the CAO.

The Director, or Manager, responsible for the delivery of a particular service would either supervise the municipal staff whose job it is to provide that service, or else would be responsible for managing the contract for the acquisition of that service from a third party and to maintain the relationship with that party. The third-party service provider could be a professional (individual or company) such as outside legal counsel, or an

assessment services provider, or could be a Regional Services Commission or a different sort of partnership that has been formed with one or more other municipalities to provide one or more services.

In a smaller municipality, the delegation of responsibilities to Directors or Managers will often also include decisions about which of those responsibilities will be retained by the CAO. Keep in mind that the more service delivery areas a CAO is directly responsible for, the less time and capacity he or she will have to devote to organizational strategic matters.

### **3.4.3 Service Levels**

Establishing service levels is within the authority of Council. When Council has well-defined service levels, their expectations are clearer for Administration. Those service levels can then guide decisions on service delivery and become the basis for the draft budget that is presented to Council, showing what funding and resources would be required to deliver services in a way that meets the established service levels.

If Council is not comfortable with the level of funding required by the draft budget, they would typically revisit and modify the service levels to achieve a funding amount that they deem to be more appropriate. If, however, the funding required to meet the established service levels is lower than expected by Council, they would then have the opportunity to consider adding a new service, increasing a service level for an existing service, increasing transfers to reserves for planned future expenditures, or reducing the upcoming tax rate. If Council has already established a set of priorities, based on a plan for the envisioned future of the community, this could be used as guidance for these decisions.

Service level policies and bylaws are becoming more prominent in Alberta, with one of the more recent ones excerpted below. This is policy GOV-020-C from the City of Fort Saskatchewan. This policy was adopted in early 2021. The excerpt here just outlines the reason for having a service level policy and then provides the policy statement. This policy speaks to why there are service levels and the criteria by which these levels are set and reviewed.

<p><b>1. PURPOSE</b></p> <p>1.1 To put in place a consistent and transparent approach for establishing, documenting and reviewing Service Levels for potential adjustment of relevant service areas offered by the City.</p> <p><b>2. POLICY</b></p> <p>2.1 The City establishes Service Levels to effectively plan for and prioritize resource needs, help manage costs, and improve communication to assist with aligning expectations between the municipality and the community on level of service and cost of service.</p> <p>2.2 Service Level identification and review informs corporate and departmental planning and budgeting, fosters continuous improvement of service processes and delivery methods and enhances decision making.</p> <p>2.3 Service Level documentation and review supports sustainable service delivery and resource management ensuring that municipal services are delivered in a socially, economically and environmentally responsible way, meet regulatory requirements and that decisions today do not compromise the ability of future generations to meet their own service needs.</p>
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*Figure 2 – City of Fort Saskatchewan Service Level Policy*

While Fort Saskatchewan is much larger than Calmar, the purpose and the policy statement would likely be very similar.

## 4 Calmar's Situation

### 4.1 Legislation

All municipalities have three levers that Council can use to move their community in their preferred direction. These levers flow through the authority provided to municipalities by the *Municipal Government Act* and other federal and provincial legislation. The levers are:

- **Bylaws:** the most impactful tool that local governments have. Bylaws provide authority to act within a wide scope.
- **Policies:** less impactful than bylaws, policies are easier to change and represent a way for a municipal Council to be predictable and to put forward an image to the community and beyond.
- **Budget:** Ultimately a Council will put its scarce resources where they will deliver the highest priorities. The budget is a combination of what must be done (i.e. pay employees, keep insurance up to date) and what Council wants to be done (i.e. rehabilitate roads, provide recreation facilities).

When looking at both bylaws and policies, all bylaws are the purview of Council to create, amend and rescind. Within the realm of policy; many of them are owned by Council, and there is another set of internal administrative policies owned by the CAO.

Looking regularly at Council's bylaws and policies is important for Council to do. In this way Council can be sure that the municipality is delivering what it ought to be delivering so it remains in legislative compliance and is able to focus resources where they have the most impact.

The Town's bylaw registers indicate which bylaws are currently in force and which have been rescinded. Some bylaws change very regularly, like fees and charges bylaws or mill rate bylaws, while others remain almost in perpetuity. A prudent Council will at least look at all their bylaws and governance policies on a regular cycle. One year, Council may review legislative bylaws, the next they may review human resource bylaws, the next service delivery bylaws. This leads to that examined life that is worth living.

When reviewing bylaws and policies, Council has three choices:

- **Leave** them the way they are, unchanged;
- **Update** them to fit a current circumstance; or
- **Rescind** them because they are no longer relevant or required.

Each of these decisions is, in itself, a policy choice. What appear below is Calmar's register of legislative bylaws.

### **BYLAW REGISTER - LEGISLATIVE**

<b>Bylaw Number</b>	<b>Description</b>
477	Debenture cancellations authorized by Municipal Debt Reduction Act
484	General Municipal Plan Bylaw
517	Bylaw providing that it is unnecessary to complete a list of electors
752	Bylaw to adopt a Municipal Crest
90-09	Tourism Action Committee
90-21	Entering into an agreement with Alarie Attorney in Fact Ltd.
94-18	Council Procedure Bylaw
97-04	Council Procedure Bylaw
97-13	Capital Region Forum
98-05	Number of Councillors
1998-12	Schedule for Deputy Mayor
2006-07	Council Procedure & Conduct
<b>R</b> 2013-08	Council Procedure & Conduct
2018-21	Council Code of Conduct
<b>R</b> 2018-22	Council Procedure
2019-09	Council Procedural Bylaw

*Figure 3 - Calmar Legislative Bylaw Register*

Looking at this register, it appears that the Town has four bylaws that speak to Council procedures that are currently in force (bylaws 94-18, 97-04, 2006-07, 2019-09). While it is likely that only the most recent of these bylaws is the current one, the others still appear to be of force and effect. One of the items on Council's legislative agenda may be to review these bylaws and rescind those that are no longer being used.

While we have illustrated the point using the legislative bylaw register, it is quite likely that there are similar outdated bylaws and policies elsewhere.

## **4.2 Governance**

Having experienced a few Town Council meetings and met with all members of Council, we have noticed some opportunities that the Town may choose to avail themselves of. These are all intended to provide the best governance possible, with the goal of helping Council achieve its strategic plan. Much of this is designed to make Council as efficient as possible.

### **4.2.1 Consent Agenda**

Some municipalities and other organizations governed by boards of directors will create a Consent Agenda to cover some routine business that must be considered within the context of a Council meeting. This is designed to shorten the length of Council meetings without removing any of the substantive content that would typically be dealt with.

This agenda format would create an 'agenda within an agenda' to omnibus several pieces of business into a single motion. Examples of what could be included are:

- Minutes of previous meeting(s)
- Reports from administration (if written)
- Correspondence

Other items that could be nuanced into a Consent Agenda would include:

- Policies being reviewed with no changes required
- First readings of bylaws (there would still be two other readings required outside the Consent Agenda).

There is a cultural change associated with Consent Agendas. These are designed to move through Council's business expeditiously, but sometimes they are perceived at first as being a way of removing transparency. Over time, Council members will see that this in fact adds transparency because the 'meaty' meeting business can be discussed more fulsomely by getting routine matters dealt with early.

If any member of Council would like to pull items off the Consent Agenda and place them on the Regular Agenda, that can be done with a simple request as part of the approval of the Council Meeting agenda. For this reason, the actual council meeting agenda approval is not included as part of the Consent Agenda.

If this is of interest to Council, the Consent Agenda could be created through a change to the *Council Procedural Bylaw (2019-09)*.

#### **4.2.2 Committees by Bylaw**

Currently, all Council Committees are identified in Part 8 of the *Council Procedural Bylaw*. This makes altering or disbanding a Committee awkward because any change in the number or mandate of committees requires a change to the Procedural Bylaw.

It is much more typical for each individual Standing Committee to be established by its own bylaw, so changes only require an amendment to that specific Committee's enabling legislation.

On this list of bylaws in the Legislative Bylaw Register on a previous page is the Tourism Action Committee. This Committee appears to have been established by bylaw in 1990 and it appears to be perhaps the only Town Committee stood up in this fashion. This Committee does not appear to be among the list of Committees that is included in Sections 54 or 56 of the Procedural Bylaw. There ought to be consistency between the two documents. This is another reason to move specific committees out of the Procedural Bylaw.

It is a wise practice to establish Standing Committees (permanent committees) of the Town by bylaw, while *ad hoc* committees or task forces could be established by policy. If a Committee is to be provided with any real authority (i.e., more than an advisory body to Council), it should be established by bylaw.

A typical Committee bylaw would stand alone, so if someone wanting to identify what the Committee does and how it acts, that person only has to review the specific Committee's bylaw.

Committee bylaws usually have a variety of sections, many of which would be the same from Committee to Committee, though the sections on mandate and membership would be different depending on the Committee. A common structure for a committee terms of reference would be:

1. Committee Purpose
2. Definitions
3. Establishment Procedure
4. Mandate
5. Terms of Reference
6. Membership
7. Meeting Procedures
8. Reporting
9. Administrative Support
10. Bylaw (or policy) Adoption and Review Dates

A template for a generic Committee terms of reference could be developed and then adapted for each Committee's specific needs.

Listed within the Procedural Bylaw, Calmar currently has 29 Agencies, Boards and Committees which are either Town led or in which the Town participates. This is a very high number for a community the size of Calmar. A regular review of the efficacy of each of these Committees would serve Council well.

In a related comment about the Council Procedural Bylaw, the order of business for council meetings is outlined in section 23. That order of business too could be a policy rather than a bylaw, again making it easier to change as required.

#### **4.2.3 Document Accessibility**

Calmar's 2020-2024 Strategic Plan identifies what Council sees as its highest priorities. Two of the top strategies (3.2.1 a, and 3.2.2 a) speak to the concept of engagement – letting people see what Calmar is doing and asking people to get involved in the life of their Town.

One of the best ways to push this type of engagement is to make Town guiding documents as accessible as possible.

### Calmar's High Priority Strategies

Sustainability Pillar	Plan Reference	Strategy
Governance	3.1.1 a	<b>Engage in financial planning to include reserve funds</b>
Thriving Community	3.2.1 a	<b>Increase community awareness of programs and services provided by the town and its partners</b>
Thriving Community	3.2.2 a	<b>Provide more opportunities for citizen engagement through open houses, town halls, and annual general meetings</b>

Figure 4 - Calmar Strategic Plan 2020-2024, High Priority Strategies

Calmar's website does provide a list of some bylaws and a few policies online in an accessible and downloadable fashion. There are also three plans on the website that may be of interest to citizens.

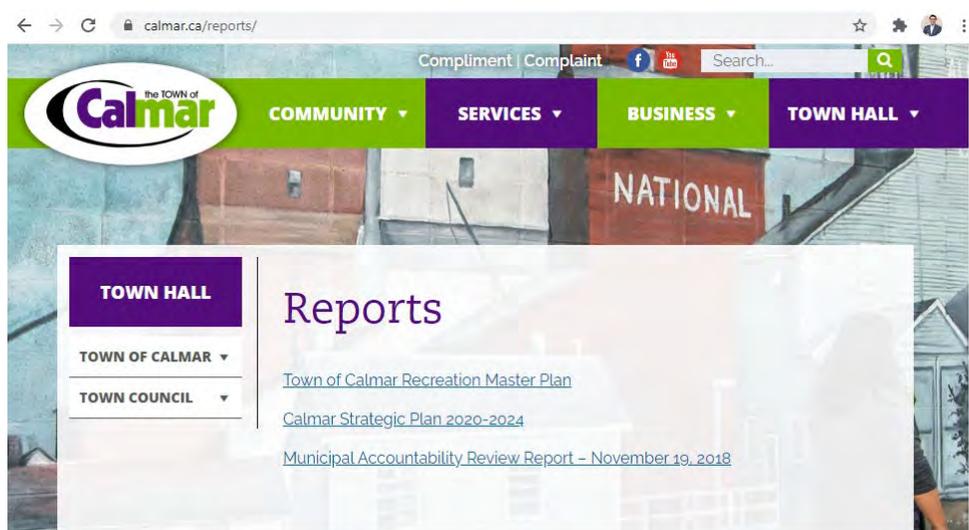


Figure 5 - Reports Available on Calmar's Website

While there is likely no need to put purely administrative documents on the Town's website, providing an accessible roster of all bylaws and any governance policies, along with other high-level reports and documents, would push towards the openness that Council appears to be desiring within its Strategic Plan.

#### 4.2.4 Role Clarity

There is a clear cascade of roles from Council right through to service delivery. The most efficient way for a municipality to operate is to know who is responsible for what and to – in the common vernacular – stick to that lane.

The audit of the cascade of management functions from Council, through the CAO, to other Town management staff (i.e. Directors) and then to front-line staff indicated some lack of role clarity. In Alberta's local government structure, municipal councillors have a single employee; their CAO.

Council members cannot direct the CAO except through resolution, meaning a single member of Council may not direct the CAO to act. In reality, some purely administrative questions from Council members to the CAO are acceptable if they are not policy-changing actions. Requests for copies of material, or for when office hours are, or when the rink might be open are common and taken as legitimate.

One practical downside of heavy Council member involvement in the activities of the CAO or other Town staff is that micromanagement may begin to occur. This often happens quietly and without much thought at first, but if not nipped in the bud, it can become a real problem.

Places where inappropriate Council member involvement commonly occur in local governments include:

Involvement in human resource management, whether through administrative policy development or review, supervising or directing staff other than the CAO, participating in staff hiring, evaluation and termination.

Involvement in service delivery, such as directing public works staff where and when to plow snow or fill potholes.

Providing volunteer effort to the community based on personal expertise the Council member may possess, such as offering to review the monthly financials with the relevant staff member if the Council member is an accountant, or fixing a broken faucet in the town office if the Council member is a plumber.

If a member of Council begins to direct the activities of a staff member other than the CAO, that staff member may be receiving contradictory instructions from two bosses. This places the staff member in an untenable situation. A negative change in culture like this is gradual, and not healthy.

An issue with accountability can also develop in this situation. If Council members are providing direction to staff, it is hard to hold the CAO or Directors responsible for any results that may or may not be achieved.

### **4.3 Management**

In the typical Canadian municipal structure, Council hires the CAO and the CAO in turn is responsible for hiring all other municipal staff. This appears to be the case in Calmar.

The mix of staff is also very important, with fit often being just as important as qualifications over time. There have been recent issues in Calmar with fit and, to a lesser extent, with qualifications. For long-term staff, sometimes the expectations change over time as advancements in technology or procedural requirements are made. Unless the incumbent undergoes regular upgrading or professional development, the Town runs the risk of the role falling behind expectations over time.

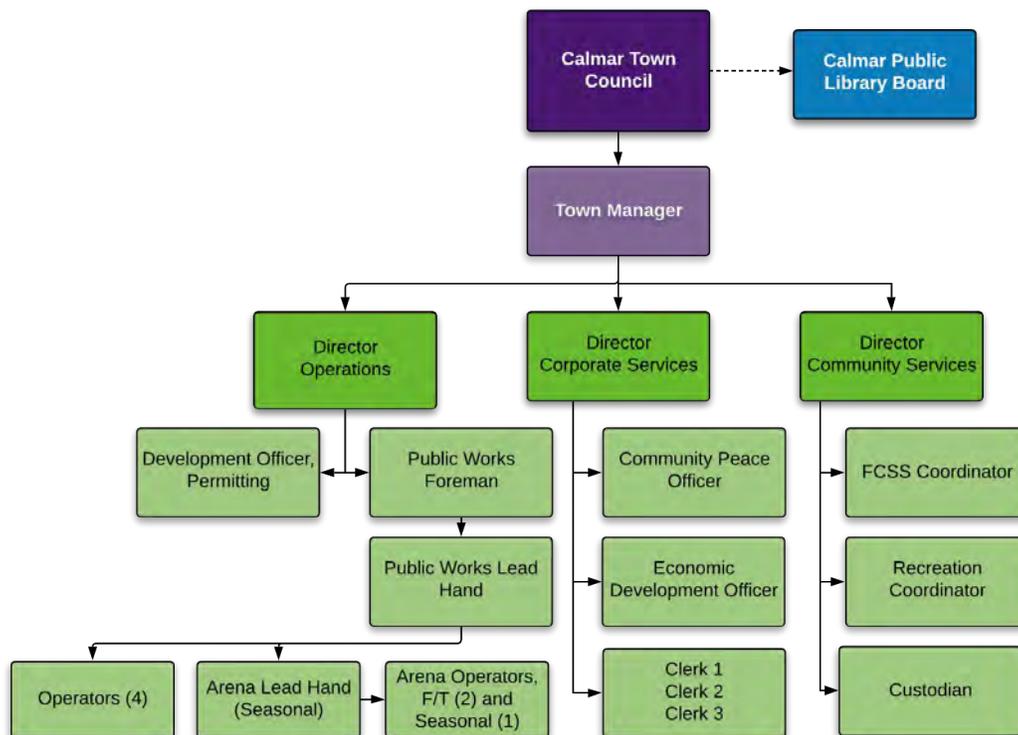
The capacity of the CAO to manage the Town's affairs is dependent on the capacity of that person's direct reports. The current organizational chart sees one manager with 12 staff (not all full time), while no other manager has more than three staff. This lack of balance would likely lead to some loss of efficiency in some areas.

What gets measured gets done, so if Council agrees that this is an issue, the topic could be included as part of the CAO's annual review, with changes tracked from one year to the next.

### 4.3.1 Organizational Structure

To the end of aligning the organization to Council's desired outcomes and wise practice in local government, we would propose some changes to the Town's organizational structure. The main change here is the replacement of the role of 'Director of Finance' with the role of 'Director of Corporate Services'. This role then could take on more responsibility than just finance. We understand that the recent staffing change made by the Town aligns with this recommendation.

Other changes shown below present a more typical structure for Alberta local governments of the size of Calmar.



### 4.3.2 Decision Making

Another aspect of management to consider is the level of decision-making. There are three levels of decision-making present in an organization the size of Calmar. Each type of decision-making must be understood and properly exercised for the eventual delivery of the programs and services for which the Town is responsible.

The Town has internal resources that primarily comprise people with skills, money, and time. Using these resources effectively is critical to the long-term sustainability of the organization.

This list ignores elected officials because their role is substantially different from staff roles.

Type of Decisions	Example Roles	Type of Decisions Required	Impact
<b>Executive Decisions</b>	<ul style="list-style-type: none"> <li>▪ CAO</li> </ul>	Ensure that the right skills are available in the correct management roles.	Concentrate on skills rather than people. Must separate people and roles.
<b>Management Decisions</b>	<ul style="list-style-type: none"> <li>▪ Directors</li> <li>▪ Managers</li> </ul>	Ensure that the people available are in the roles that suit them best and which will provide the best chance of success.	Concentrate on people. Use individuals' skills to the greatest advantage.
<b>Operational Decisions</b>	<ul style="list-style-type: none"> <li>▪ First-level managers</li> <li>▪ Front-Line staff</li> </ul>	<p>Internal - provide services to Town staff and volunteers.</p> <p>External – provide services to Town residents, businesses, and organizations.</p>	Attitude is very important. These are often the individuals seen by those outside the organization. They represent the Town in how they serve.

Not having clarity in this type of decision-making is bound to lead to strife and a pull between what is expected and what is actually done, particularly in terms of management.

There can be difficult decisions for the CAO to make if the necessary skills are not present. The CAO has to separate the required skills from the human and make decisions accordingly. A caveat to this is that aptitude and attitude are more important than specific skills – within reason of course. A person who 'fits' the organization, but who needs skill building is more likely to be successful than someone with more skills than required, but who chafes against the organizational culture. As Peter Drucker is noted to have said "*culture eats strategy for breakfast.*" The same applies for human resources too – 'attitude (culture) eats skills for breakfast.'

Our observation is that Calmar has seen situations evolve where the fit of individuals is not optimal even though the skills are present. The CAO appears to have been taking steps to address this, and Council is aware of this already.

#### **4.4 Role Clarity**

The issues of role clarity mentioned in the Governance section of this report is just as much an issue if it cascades downwards into management. If the CAO begins to micro-manage staff, this too creates a problem. Staff members are hired for their expertise. If direction given by their manager is not clear enough, that is where the problem lies.

Through the course of this audit, there were indications that the CAO is spread too thin. The current organizational chart illustrates that the CAO is not focused on executive decisions. A good example of this is that the CAO has the custodian as a direct report. In a municipal corporation the size of Calmar, there should be at least one, and perhaps two, levels of staff between the CAO and the very frontline custodian.

This need to focus on high-level decisions is one of the reasons our suggested organizational structure (figure 6) moves the responsibility for the custodian away from the CAO. While we use the custodian as an example, a similar issue may exist with other inside staff. If an executive is providing too much direction to front-line staff, that person will not have the time to focus on carrying out the will of council as expressed through the Strategic Plan. This execution is often linked to the creation and adoption of a corporate business plan or operational plan that illustrates how the CAO intends to carry out Council's desires. This plan is owned by the CAO rather than Council, so it remains the CAO's document. While Council likely needs to know that the business plan exists, it is not their plan.

Much like how getting into the weeds can be a problem for Council, it can be a problem for the CAO and Directors as well. Conscious effort needs to be made to ensure that there is a culture built that requires a focus on the proper level of authority.

#### **4.5 Service Delivery**

By accounts from the majority of those interviewed, the actual delivery of service from the Town to residents, businesses and organizations appears to meet the needs of those groups. Often when an organizational audit like this is requested, it is because the service delivery aspect of municipal government is not meeting peoples' needs.

##### **4.5.1 Service Review**

We base this insight on interviews only rather than on broader public engagement. Such an exercise would be a worthwhile endeavour and ought to be considered on a regular and ongoing basis.

Section 3.4 above speaks to various types of service reviews that align available resources with desired programs, services, facilities, and amenities. A regular review of what the Town provides and how well that responds to community needs will eliminate spending in areas that are no longer high demand, and free up resources to spend in potentially new areas of demand.

A current example of this within Alberta communities is the repurposing of some tennis courts to become pickleball courts. When they were built, the tennis courts met a growing demand, and that demand has gradually waned over time. Concurrently, the popularity of pickleball has grown and demand for courts has grown along with it. Should a municipality not understand the process that has occurred, it is possible that new pickleball courts would be built while current tennis courts go underutilized. The prudent move is to convert some of those tennis courts for use as pickleball courts.

This is one example, but there are many examples of how service demands change over time. Gaining insight into these changes will allow Councils to align what and how services are delivered to make best use of limited municipal income.

Often, these changes are based on a 'gut feel' rather than specific evidence. Service level reviews based on a related policy help bring the municipal government into alignment to understanding that they cannot be all things to all people. There are dollars to be saved with minimal political capital being spent.

A full, in-depth service review will take time and it can be spread out over time – examining public works this year, recreation next, social services the following year, and so on. Should Council adopt a service level review policy, these types of details can be set out in that document.

There is a note to be said about how politics plays into service delivery. Everything that the Town does now was originally created because it was either directly or indirectly added based on a decision of Council. Changing or removing that service type or service level is also a political choice. The amount of political capital required will change over time, but removing or changing anything that is currently in place will have at least a minimum amount of political consideration.

#### **4.5.2 Regional Service Delivery**

When travel took time and communication was slow or awkward, the idea of municipalities was that they would be more or less self-contained. That is no longer the case. The definition of 'community' has changed from a purely geographical one where we all interacted with our neighbours, to more of an interest-based community that may include members who do not live within geographical proximity to one another.

The same reduction in impediments caused by the cost of travel or the speed of communication can be brought to bear for local governments. When Calmar began, it had to provide all services to all people without the benefit of outside assistance. Now, there is nothing stopping the Town from providing service in a multitude of ways, so long as they meet the needs of citizens.

Ignoring the concept of eliminating the service entirely, there are three fundamental ways of delivering services as a local government now. These are listed by frequency of common practice:

Type of Service Delivery	Advantages	Disadvantages
<b>In house</b>	<ul style="list-style-type: none"> <li>Town has first-call on the time of the service delivery person.</li> <li>Can be quick response time.</li> <li>Pride of Town ownership</li> </ul>	<ul style="list-style-type: none"> <li>Opportunity cost if service is not commonly required.</li> <li>Specialized staff and training can be expensive.</li> </ul>
<b>Contracted</b>	<ul style="list-style-type: none"> <li>Typically lower cost.</li> <li>Easy to add or remove service types or levels of services.</li> </ul>	<ul style="list-style-type: none"> <li>Response time will often be slower than in-house.</li> <li>Service or equipment is not owned by the Town.</li> <li>Can become more expensive if the service is frequently used.</li> </ul>
<b>Regionalized</b>	<ul style="list-style-type: none"> <li>Specialized expertise from other municipalities.</li> <li>Regional understanding.</li> </ul>	<ul style="list-style-type: none"> <li>Some equipment may be needed in other municipalities at the same time.</li> <li>Limited direct control of timing of service delivery or specifics of the service available.</li> </ul>
<b>No Delivery</b>	<ul style="list-style-type: none"> <li>Lowest short-term cost.</li> </ul>	<ul style="list-style-type: none"> <li>Service may still be desired by some.</li> </ul>

Where time is not of the essence, looking towards regional service delivery has become more common in recent years, spurred on by regional service commissions, Intermunicipal Collaboration Frameworks, and alliances like the 39/20 Alliance. Some service make sense to look at regionally, while others do not.

An example of a place where regional service delivery makes sense would include those services which are expensive to offer because they require dedicated professionals if they are to be done comprehensively. This includes internal functions like human resource management, finance, communications, permitting, etc. While Calmar provides these services, they are not under the management of related dedicated professionals. As a thought experiment, a group of municipalities could hire a Director of Human Resources, and also retain HR clerks within each partner municipality. The Director could provide oversight, while direct delivery happens at the local level. A similar experiment could be done for finance, communication or permitting as other examples.

There are places where regional service delivery does not make sense, and that would be in places where there is competition between the potential partners. For example, every town needs the snowplow at the same time, so sharing that type of equipment could be unsuccessful.

Similarly, topics like business attraction or economic development may not be ideal for regional sharing, unless there is an understanding among partners about how to determine whether the inherent competition can be overcome to the benefit of all.

There is certainly strength in numbers, as Calmar's participation in regional service commissions and mutual aid agreements illustrates.

## 5 Recommendations

Based on the pages above and the gaps identified between the ideal state of local government in Alberta and what was found through the audit of Calmar's situation, the review team has developed a series of recommendations for Council to consider. Some of these are significant, but many comprise minor mid-course corrections.

### 5.1 Governance

**We recommend that:**

- a) Town Council formally receives this report, and likely refer it to Administration.
- b) The Executive Summary, and possibly the entire report be released publicly once reviewed and redacted as necessary.
- c) Town Council review all Town governance policies once each term and renew, revise, or rescind policies as necessary.
- d) Council identify whether it is delivering on its priority programs and services through a process like Priority Based Budgeting.
- e) The Town budget includes resources that build capacity in management and staff. This may include leadership coaching and professional development.
- f) Council direct Administration to look outwards for examples of best practices in other local governments and adapt them to Calmar's experience as wise practices.
- g) Council create and adopt a Service Level policy or bylaw.
- h) All Standing Committees of Council be established through bylaw.
- i) Committees of Council involve Town residents as members wherever possible, as appropriate, as a way to cultivate leadership and broad interest in the Town, and that Council consider whether external individuals ought to occupy the chairs of those committees.
- j) The Town's Procedural Bylaw (2019-09) be edited to remove the order of business of council meetings, and that an Order of Business policy be created.
- k) The Town's policy on Nepotism (Human Resource Policy 2017-026, page 8) be reviewed to ensure it still meets Town needs and legislative requirements.
- l) No staff member be allowed to directly supervise a family member (parent, child, sibling).
- m) Council remains aware of their governance role vs the role of management and administration that is led by the CAO,

## 5.2 Management

### We recommend that:

- a) The CAO revise the Town's organizational chart to include a Director of Corporate Services and to alter some reporting relationships to streamline the Town's reporting structure.
- b) The CAO revise the Town's organizational chart to reflect appropriate different scopes of duties similar to those identified in Figure 7 of this report.
- c) Reduce CAO direct reports to between three and four roles.
- d) The CAO concentrate on high-level management and delegate service delivery matters to managers and staff wherever possible.
- e) Communication and engagement be upgraded with the goal of all staff being aware of pending Town activities.
- f) The Town develop a strategy for communications with external stakeholders (such as residents and businesses located within Calmar), including the circumstances that warrant such communications, and the appropriate methods for such communications; and that the Town consider including this strategy in the Town's Public Participation policy.
- g) Business or operational planning be conducted annually with the input of as many staff as possible. The resultant plan must be designed to deliver priorities identified in the Town's strategic plan.
- h) Records management be more robust, with information management systems used conscientiously.
- i) All agreements with external bodies to provide goods and services to the Town be formalized through written contracts.
- j) A capital replacement plan, including the preventative maintenance timing and costs be kept current and funded.

## 5.3 Service Delivery

### We recommend that:

- a) The Town consider embarking on a regular review of the number, type, and intensity of services provided.
- b) Calmar identify which, if any, Hard, Soft and Corporate services could be delivered jointly with other municipal partners as a way to engage required expertise while retaining capacity within the Town.
- c) Alternate work arrangements be considered in light of learning that has happened through the COVID-19 pandemic. These arrangements must be equitably distributed through policy decisions and must not negatively affect delivery of programs and services.

## 6 Conclusion

When we are asked to provide an audit like this, there are two main areas of focus we look at. We look within the organization to identify whether the Town is providing efficient service to the community. We look at the history and structure of the organization and we look at how relationships between and among Council, Management and Staff are either helping or hindering the work of the Town. When we look outwards, we try to determine to the best of our ability whether the Town is providing the right services to the right people at the right time in the right quantity.

This is an audit, so our review right across the municipal corporation was to look for places where improvements can be made and perhaps where more review is required. We have provided some insights in this report between what we see in a well governed and run Town and what we see in Calmar. The results of that provide us with a gap analysis which we then address through the series of recommendations. No matter where we look at any municipality, there is always room for improvement.

Fundamentally, it appears that Calmar is on the right track. There are changes to make of course, but there are not apparent fires that need to be put out. That said, if some of the issues we identify are not addressed, those fires could eventually start.

Calmar runs fairly efficiently from an inwards-facing perspective. According to interviewees, the Town delivers – by and large – what citizens and others require of their Town.

If there is one major suggestion coming out of this audit, we would recommend that the Town embark on a service level review process. While it is not urgent, it would assist with providing good governance to the Town and subsequent decisions may free up some resources to concentrate in high priority areas.

The review team thanks Town Council, Directors and Staff for their insights and candor. This type of process can be disruptive, and Town staff were very pleasant to deal with.

## 7 Appendices

### Appendix 1: Interview Questions

These are the theme areas that were explored with each interviewee. The list was modified somewhat for Council vs Administration interviews:

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1. What do you love best about working for Calmar?
  - (a) Why did you want to work for the Town of Calmar when you first started here?
2. What do you believe are the best services and programs the Town delivers for residents and businesses in Calmar?
  - (a) What services are most important to residents and business owners in the Town?
  - (b) What services are least important?
3. In your own words, what are the key issues impacting the Town of Calmar as you see them that have resulted in Council requesting this audit?
4. What do you see as a potential outcome from this audit?
5. If you could change one thing with the way the municipality is organized, what would it be?
6. Is there anything about the way the Town of Calmar organization is structured that creates inefficiencies? Ineffective service delivery? Waste?
7. Have you ever suggested organizational changes to anybody in the organization?
  - (a) Was your suggestion seriously considered?
  - (b) Was it implemented?
  - (c) Is there anything about the way the organization is structured that is an impediment to improvement/growth/development?
8. Who else do you feel we should be interviewing as part of this process?
9. Have we covered the major issues that we need to consider? Are there any areas we are missing? Please provide us with additional comments by email if something comes to mind after this interview.