

Councillor Orientation – Charting the Course for Success





Society of Local Government Managers -
Municipal Administration Leadership Workshop


Andrew Wood, Municipal Advisor
Lucien Cloutier, Municipal Advisor
May 15, 2025 9:00am – Noon

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Agenda

-  Getting Started
-  Orientation Training Requirements
-  Training Considerations
-  Questions




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Why is Orientation Important?




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Ouch!



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What About Returning Councillors? What's in it for them?

Serves as a refresher
Many provisions have changed
Your organization has changed
Everyone needs to be presented with the same information

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Getting Started

What is the importance of councillor orientation?

What are the key elements to preparing for delivering orientation?

What are some of the difficulties you could face in presenting orientation?

On a more practical note, should you hire a 3rd party for some/all of it? Which parts?

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Getting Started – Swearing In!

Section 2 of the *Oaths of Office Act*

When by a statute of Alberta a person is required to take an official oath on (a) being appointed to an office other than that of judge or justice of the peace, or (b) being admitted to a profession or calling, the oath shall be taken in the following form:
I, _____, swear that I will diligently, faithfully and to the best of my ability execute according to law the office of _____.
So help me God.


- Must be done by a commissioner of oaths or notary public (lawyer).
- Council members can't carry out their duties until they've taken the oath.
- Full list at: <https://www.alberta.ca/notaries-and-commissioners>

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A Tale of Two Buckets



A

On or before
Organizational
meeting



B

On or before
first council
meeting

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Training Requirements - Sec 201.1(1)

Bill 20, the Municipal Affairs Statutes Amendment Act, was proclaimed on October 31, 2024 and introduced changes to councillor orientation.

A municipality must offer, and each councillor *must attend* orientation training.

Previously, training had to be offered but attendance not required.




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Training Requirements - Sec 201.1(1)




Topics for the First Set (Bucket "A"):

- role of municipalities in Alberta;
- municipal organization and functions;
- roles and responsibilities of council and councillors;
- roles and responsibilities of the chief administrative officer and staff;



Must be completed prior to or on the same day as the first organizational meeting (latest is November 4).

- Tight timelines: plan ahead!
- Official results October 25!






For a by-election, on or before the day that the councillor takes the oath of office.

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Training Requirements - Sec 201.1(1)

		
Topics for the Second Set (Bucket "B"): <ul style="list-style-type: none"> • key municipal plans, policies and projects; • budgeting and financial administration; • public participation; • any other topic prescribed by the regulations; 	Must be completed before or on the same day as the first regularly scheduled council meeting. <ul style="list-style-type: none"> • Can be extended up to 90 days by council resolution 	For a by-election, within 90 days of taking the oath of office.

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Training Considerations - Discussion

- What are the key documents in your municipality that should be reviewed?
- How long will you need to adequately review the major policies, projects, plans, etc. of your municipality? Is a day long enough?
- What issues or concerns can you see possibly arising from this process and how can you mitigate them?

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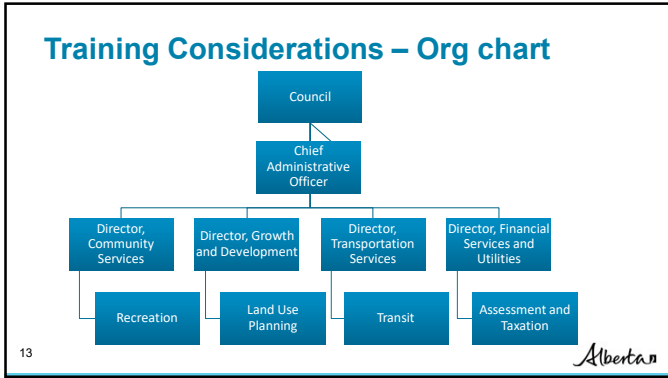
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Filling Your Buckets



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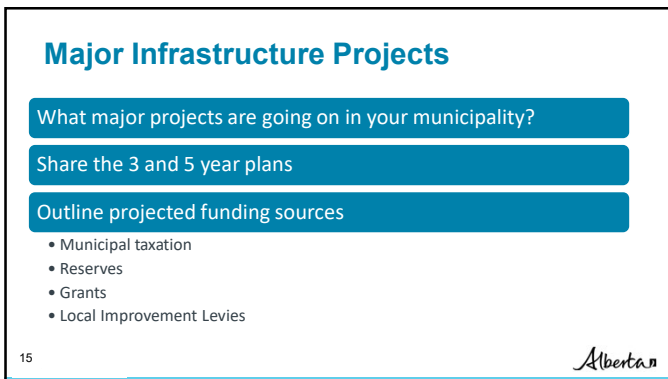
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Which Staff Should Attend Orientation?

- Should new staff attend?
- Should senior staff attend? Where do you draw the line?
- Which staff should attend to observe and which staff should both observe and participate in some manner?
- Should there be a separate orientation for staff regarding council and admin roles?

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Mock Council Meeting

Which procedures should be demonstrated?

- Chairing a meeting
- Adding items to the agenda
- Acting by bylaw or resolution only
- Process for pecuniary/conflicts of interest
- Going into and coming out of closed session
- Amending motions
- Bylaw readings
- Notices of motion (if applicable)
- Participating by electronic means
- Public hearing process

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Other Topics

- Administrative Information Requests
- Facility/Infrastructure Tour
- Social Media Use
- Communications Channels
- Public Engagement
- Governance During a State of Emergency
- Inclusion & Diversity
- Freedom of Information & Protection of Privacy Act
- Strategic Plan
- CAO Evaluation

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Orientation Binder

- Mission, vision and values statement
- Councillor job description
- Council calendar
- Committee list
- Audited financial statements
- Current budget
- Procedure bylaw
- 3 & 5 year financial plans
- Organizational chart
- Strategic plan (executive summary)
- Councillor and senior staff contact list
- CAO bylaw & job description
- Councillor expense policy/forms
- Examples of council agendas & minutes

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Resources

- CAMA Council Orientation Toolkit
- What Every Councillor Needs to Know
- FOIP Bulletin - Records of Elected and Appointed Officials of Local Public Bodies
- Social media resource guide – Abmunis

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Questions?



Website: www.alberta.ca/municipal-government-resources
 Phone: 780-427-2225 or toll free by dialing 310-0000 first
 Email: MA.advisory@gov.ab.ca

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