

# PADM 308 – MATI

## The Successful CAO: Local Government Advanced Management

November 3 - 8, 2019

The Cove Lakeside Hotel, West Kelowna, BC

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



This course was  
developed with  
generous support  
provided by:



# 2019 MATI – THE SUCCESSFUL CAO

## The Program

**A**re you new to the job of CAO or thinking of taking on the challenge? Are you an experienced CAO looking for some training targeted to your unique role? Are you interested in how to plan for success and avoid some of the common pitfalls of the job? If so, then *MATI The Successful CAO* is for you!

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

**In this week long residential course you will...**

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



## The Sessions

### SUNDAY EVENING

SESSION  
OPENING  
AND  
KEYNOTE

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

MODULE  
1

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

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

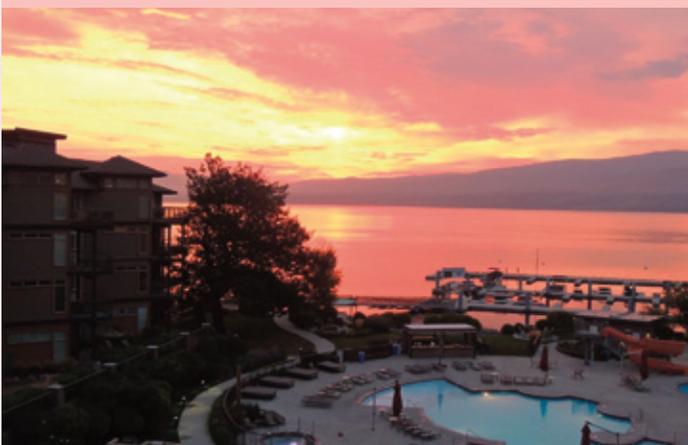
MODULE  
2

### *The Joys and Common Pitfalls of the CAO Role*

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

### Time and Place

The 2019 session of MATI The Successful CAO will start at 4:00 p.m. on Sunday, November 3, 2019 at The Cove Lakeside Hotel, West Kelowna, BC. The course will run until late morning on Friday, November 8, 2019, with participants living "in residence" at the hotel. See: [www.covelakeside.com](http://www.covelakeside.com).



# 2019 MATI – THE SUCCESSFUL CAO

## The Sessions (continued)

### MONDAY MORNING

#### MODULE 3 *Who Does What?*

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

### MONDAY AFTERNOON

#### MODULE 4 *Assessing Your Organization's Situation*

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

### MONDAY EVENING

#### *One-on-One Sessions With Experienced CAOs*

Friday evening will be an opportunity to meet one-on-one with a veteran local government CAO. Book an appointment and take advantage of this unique opportunity to sit down privately with an experienced CAO, to discuss a problem or explore an opportunity. Our list of mentors includes: **Jerry Berry**, Consultant and former City Manager, Nanaimo, **Elsie Lemke**, CAO, District of Peachland, **Ron Mattiussi**, former City Manager, City of Kelowna, **Debra Oakman**, former CAO, Comox Valley Regional District, **Ron Poole**, CAO, Regional District of Kitimat-Stikine, **Brian Reardon**, CAO, Regional District of Central Okanagan, and **Mike Younie**, CAO, District of Mission.

### TUESDAY MORNING

#### MODULE 5 *It's All About Relationships: Leading Up, Down, and Out*

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

### TUESDAY AFTERNOON

#### MODULE 6 *Ethics and the Responsible CAO*

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

### TUESDAY EVENING

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



# 2019 MATI – THE SUCCESSFUL CAO

## The Sessions (continued)

### WEDNESDAY MORNING

#### MODULE 7 *Supporting Council/Board Effectiveness*

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

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

Session leaders **Allison Habkirk** and **Chris Barlow**, CAO, City of Castlegar, will explore the foundations of strategic planning, and outline Castlegar’s successful approach to integrating strategic goals into local government operations.

### WEDNESDAY AFTERNOON

#### MODULE 9 *Organizational Culture*

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

#### MODULE 10 *Service Reviews*

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

### WEDNESDAY EVENING

#### MODULE 11 *CAO Roundtable Discussions*

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

### THURSDAY MORNING

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

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

#### MODULE 13 *Come Hell or High Water!*

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

### THURSDAY AFTERNOON

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

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



### FRIDAY MORNING

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

Participants will report out on their Action Plans and learning goals for professional growth and success! The course will end by 10:15 a.m. on Friday.

# REGISTRATION

## University Credit

As with the other MATI courses offered by Capilano University in partnership with LGMA, participants are strongly encouraged to enroll in the program as a three-credit Capilano University course, PADM 308. Students and employers tell us that they get more out of the course when taken for credit. All credit students will complete two short written assignments and receive their final grade on the last day of the course.

## International Institute of Municipal Clerks (IIMC)

The IIMC grants the professional designation known as Certified Municipal Clerk (CMC). To earn the CMC designation, you must have the education and pertinent experience required by the IIMC.

Each of Capilano University's Local Government Program courses (including all Capilano MATI courses) is accepted by the IIMC towards the CMC designation when taken for credit.

MATIs offered through Capilano University each provide 30 points of the total required 60 IIMC points. For more details on Capilano University courses and IIMC requirements, contact Alison McNeil at Capilano University ([amcneil@capilanou.ca](mailto:amcneil@capilanou.ca)) and visit the IIMC website at [www.iimc.com](http://www.iimc.com).

## Pre-Requisites and How to Register

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

Managing People, MATI Leadership, or PADM 307 Ethics in Local Government. If you are a current CAO (including an Acting or Deputy CAO), but do not meet the pre-requisites, please contact **Linda Adams** at [lindaadams@capilanou.ca](mailto:lindaadams@capilanou.ca). To apply for attendance at MATI The Successful CAO, please go to the CivicInfo 'Events' website and **apply by July 15. After this date, contact Anna Delaney** at [adelaney@capilanou.ca](mailto:adelaney@capilanou.ca) to inquire about space availability.

Register at:

<https://www.civicinfo.bc.ca/event/2019/MATI-CAO>

## Fees

The fee per participant is \$3000 (plus \$150.00 GST). LGMA members are entitled to a discounted rate of \$2,730 plus GST. Upon completion of this MATI course, the LGMA will provide a reimbursement to your organization for this member-preferred rate. If you have any questions, please contact [office@lgma.ca](mailto:office@lgma.ca). This is an all-inclusive fee, which will cover tuition, course materials, accommodation, all meals and refreshment breaks, and all special recreational activities. The fee can be paid on-line by credit card at the time of registration or by sending a cheque for \$3,150.00 to:

Local Government Management Association of BC  
Financial & Program Administration  
Suite 710A - 880 Douglas Street  
Victoria, BC V8W 2B7

## Refund Policy

Refunds will be processed until July 15, 2019 subject to a \$50 LGMA administration fee. After July 15, 2019 no refunds are provided; however, registration may be transferable to another qualified candidate.



# FUNDING ASSISTANCE AND FACULTY

## Board of Examiners Certificates and Scholarships

**M**ATI CAO participants will be eligible for a scholarship from the provincial UBCM Commemorative Scholarship fund. Those interested in a scholarship may apply by submitting a scholarship application to the Board of Examiners. Application forms are available on-line from the **Board of Examiners website**, or search for Local Government Staff and Development on the Government of BC website **[www2.gov.bc.ca](http://www2.gov.bc.ca)**.

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

For further information on the Board of Examiners, please visit the Board of Examiners' website or email: **[bcboardofexaminers@gov.bc.ca](mailto:bcboardofexaminers@gov.bc.ca)**.



## 2019 MATI CAO – GUEST FACULTY TEAM

<b>Elsie Lemke</b>	CAO, District of Peachland and MATI Course Chair
<b>Ron Poole</b>	CAO, Regional District of Kitimat-Stikine and MATI Mentor
<b>Linda Adams</b>	Course Coordinator and former CAO, Islands Trust
<b>Chris Barlow</b>	CAO, City of Castlegar
<b>Jerry Berry</b>	Consultant and former City Manager, Nanaimo
<b>Doug Gilchrist</b>	City Manager, City of Kelowna
<b>Allison Habkirk</b>	Course Instructor, Town Planner, Educator, and Local Government Consultant
<b>Ron Mattiussi</b>	Former City Manager, City of Kelowna
<b>Debra Oakman</b>	Former CAO, Comox Valley Regional District
<b>Kevin Ramsay</b>	Consultant and former City Manager, City of Port Moody
<b>Brian Reardon</b>	CAO, Regional District of Central Okanagan
<b>Lori Wiedeman</b>	CAO, Village of Queen Charlotte
<b>Mike Younie</b>	CAO, District of Mission

*If you have any questions, please contact:*

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