



SUBJECT: Training and onboarding strategy for committee appointees
TO: Corporate Services, Strategy, Risk & Accountability Cttee.
FROM: Office of the City Clerk

Report Number: CL-16-21

Wards Affected: all

File Numbers: 130-02

Date to Committee: June 7, 2021

Date to Council: June 22, 2021

Recommendation:

Receive and file office of the city clerk report CL-16-21 regarding training and onboarding for committee appointees.

PURPOSE:

Vision to Focus Alignment:

- Building more citizen engagement, community health and culture
 - Deliver customer centric services with a focus on efficiency and technology transformation
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Background and Discussion:

Advisory Committee Review was conducted throughout 2019, the review had a wide focus, which also addressed committee member experience. Through the review a common theme was a concern with the lack of training provided to new appointees and existing members. Members of the public who were surveyed expressed a desire to understand more about the city's governance system, especially when making the decision to apply to serve on a committee or board.

At the February 25, 2020 Council Workshop on Advisory Committees, two members from the Citizen Advisory Committee Review Team presented a report dated January 6, 2020. The Team's report also expressed the need for a greater attention towards the onboarding and training for the advisory committees, and for Chairs of advisory

committees. Based on the outcomes of the Council workshop, Council moved a motion at the March 12, 2020 CSSRA, subsequently approved by Council on April 20, 2020 to re-direct the Committee review and part of that motion requested that staff create a standardized training and orientation for new and returning members.

What was Onboarding and Training before the Review?

Based on the review, the City of Burlington's onboarding and training regime needed a refresh. New recruits were provided with a handbook that required a sign off for the Code of Conduct, an accessibility guide with applicable sign off, and a copy of their Terms of Reference. With each cohort of new appointees, the Committee Clerk of the appropriate committee would provide a PowerPoint introduction to the committee for new and returning members, this orientation is part of a regularly scheduled meeting.

Proposed Approach

In September 2020 Council directed staff to reinstate the committees, and in accordance, the committee review was re-aligned. The task of reviewing onboarding and training materials was brought forward to help orient the 2021 new recruits to their committee appointments. The Office of the City Clerk reviewed its training materials, with the view to tailor its holdings to be focused on members and what they needed to fulfill their roles on committee. With limited time and resources, staff chose to reinforce current materials instead of creating new. In time, new materials will be introduced to strengthen the program. In addition, future training aids will feature other mediums such as video or e-learning to diversify how members receive and process information. In addition, all items (when possible) will be posted to the city's website, which will provide members an online resource. Creating an online resource also provides the public with an area where they can learn about the committee experience, a consistent theme throughout much of the committee review survey responses from the public.

Revamped Committee Member Handbook

In using existing materials, staff reviewed the Committee Member Handbook and made necessary enhancements. The focus of the handbook shifted towards members, and providing the relevant information for their role, it included the following enhancements:

- Welcome statement by the City Clerk.
- A general overview of the City of Burlington, its corporate structure, and core services.
- An overview of the City's Strategic vision and work plan documents with a connection to how committees support the City's overarching visions and goals.
- Shifting the focus to be about the Member as opposed to the City – this can be seen in the language used, positioning of items throughout the document, and in the visuals used, a move away from standard corporate photos or stock images, to photos of City of Burlington advisory committees and its members at work.

- Sections were reviewed to ensure that they were accurate with sections added on Conflict of Interest, Records Retention, Access to Information, Protection of Privacy.
- Entire Code of Conduct for Committees of Council was included for members to read and review before signing off.

As part of a welcome to new and returning members a kit of material was mailed out to all members. The packet included the following materials.

- Covering Memo to explain the package
- Committee Member Handbook (with code of conduct attached)
- Accessibility Training Handbook
- Corporate Accessibility Policy
- Instructions for using Zoom
- Municipal Conflict of Interest Act
- Terms of reference for specific committee
- Meeting schedule for specific committee
- Loose sign off sheet for the Accessibility Training Handbook
- Loose sign off sheet for the Committee Handbook

New Member Orientation Session

On March 31, 2021 the Office of the City Clerk provided a training and onboarding session for all new appointees on MS Teams Live. Geared at first time appointees, the session was intended to be a safe space for new members to ask questions and to get the information they need to feel confident in serving on their committee. This session is offered in addition to the regular training that occurs at an advisory committee meeting. The training offered during an advisory committee meeting will remain, and may shift somewhat to be more about the specific committee, and its mandate. As this was the first year, existing members heard of the opportunity and expressed interest. The session was extended to all advisory members, and over 60 participants logged in and participated.

The session included the following:

- Introduction and greetings from City Manager
- The Big Picture – introduction to the City’s strategic plan, and the vision to focus from the Executive Director of Strategy Risk and Accountability
- Committee Structure, Code of Conduct, Conflict of Interest, Accessibility – from the City Clerk
- Introduction of Burlington’s new Volunteer Program from the Engagement and Volunteer Coordinator
- Meeting Fundamentals – from a Committee Clerk

- Information Management and Access and Privacy – Manager of Records and Information and Deputy Clerk

After the session a feedback survey was sent to all members, who attended the session. The survey had 28 responses. All responses received were positive. Some of the highlights of the feedback are as follows:

- One member noted their difficulties with the MS Teams live platform.
- One member would have preferred to have received the package and handbook in advance to review materials before the session.
- One member pointed out that the explanation and use of the term alternate member, was not like another municipality where they previously volunteered.
- Several members commented on the ease of having a virtual learning experience.
- Several members spoke to the convenience of having the session in the evening and spoke favorably that the session was recorded and would be posted.

Staff are committing to providing a new member orientation when a new cohort of public appointees are appointed by Council. The scale of these learning opportunities will be connected to the size of the appointed cohort. At the session, staff committed to posting the video, a formal questions and answer document, and a copy of the slide deck to serve as a resource for advisory committee members.

Creation of a Webspaces for Materials

Part of the strategy included creating a space on the City's website to post training and onboarding materials. This webspaces provides universal access to those who wish to gain a refresher of their training and provides prospective members a window into our practices and culture when deciding to apply to serve on an advisory committee. The webspaces is located on the [Committee and Boards page](#) on the city's website and listed under the heading Resources. The resources include the following:

[Video from Orientation Session, March 31, 2021](#)

[Presentation from Orientation Session, March 31, 2021](#)

[Questions and answers from Orientation Session, March 31, 2021](#)

[Orientation presentation at Advisory Committees](#)

[Advisory Committee Handbook](#)

[Accessibility Training Booklet](#)

[Corporate Accessibility Policy](#)

[Municipal Conflict of Interest Act](#)

Future use of Better Impact

The Office of the City Clerk will be moving towards using Better Impact (program) to help coordinate committee and board volunteers. The software will assist in recruitment, onboarding and training. Once implemented the Office of the City Clerk will assess its current training plan to determine what training can be completed as an e-learning module. At present the Accessibility Office has created a module about the Accessibility for Ontarians with Disabilities Act (AODA) which will replace the need for the Accessibility training booklet. Through Better Impact, and its e-learning modules, there is an ability for administrators to track what modules a volunteer has completed. This audit function will help to ensure that all members are sufficiently onboarded and have completed their compulsory training.

Annual Chairs Meeting

In the past, the City of Burlington had an annual meeting of the Chairs of all advisory committees. In review of the motion from Council, the Annual Meeting of Chairs will return. To help with succession planning, the respective vice-chairs will also be invited to attend. These sessions will focus on leadership and will afford the chairs and vice-chairs the ability to meet one another, to network, and to learn from shared experience. The meeting is currently being planned, however, some confirmed topics are procedure, conflict resolution, a media and spokesperson briefing, and an introduction to engagement at the City of Burlington.

Strategy/process

The Office of the City Clerk is committed to ensuring members of the advisory committees are provided with training and learning opportunities. In addition, the training strategy will be reviewed and improved as it progresses. The Office of the City Clerk will also survey members and use their feedback to help future iterations of the session or their feedback may help day to day operations. Any changes that Council makes based on the committee review will directly affect the training and onboarding strategy.

The Office of the City Clerk is also working on building its general civic education materials. It is anticipated that this will help to augment the general public's understanding of local government and may lead to more informed residents, with greater participation in the city's governance system. Some of these general items may also be used in training and onboarding our members.

Options Considered

The Citizen Advisory Committee Review Team's report recommended (recommendation 6) "Without infringing on IAP2 training exclusivity some form of training must be provided for new advisory members." The International Association for Public Participation (IAP2) has in-depth training programs on teaching its principles and how it conducts its functions of practice. Currently our goal is to ensure that members have the basics to enable that they can serve on a committee. Some form of IAP2 training may be provided to chairs and the vice-chairs, as this may help them coordinate discussion at the committee level. IAP2 training may form part of a future iteration of the advisory committee training program.

Financial Matters:

At present with most of the learning opportunities being held online staff are able to leverage existing budgets within the Office of the City Clerk to cover costs. Based on the advisory committee budget review, there may be a proposal to utilize some of those unspent funds on bringing in guest lecturers or presenters to augment learning opportunities for City of Burlington advisory committee members.

Total Financial Impact

Not Applicable

Source of Funding

At this time the Office of the City Clerk's budget can support the programming outlined in this report.

Other Resource Impacts

Not applicable.

Climate Implications

When in person meetings are in order, the Clerks Office may continue the practice of virtual learning sessions. These sessions allow for people to participate in training sessions from the comfort of their own home and allows staff to provide a video after the session for minimal cost. In addition, the use of Better Impact may allow for the Office of the City Clerk to go fully digital with its training materials, this will reduce printing costs and postage costs, if we continue to be holding virtual committee meetings. These

actions may have a cumulative impact on lowering the carbon footprint of programming of the Office of the City Clerk.

Engagement Matters:

In preparation of this report, staff consulted the surveys produced by the committee review, total 452 survey submissions. In addition, staff reviewed report from the Citizen Advisory Committee Review Team, dated January 6, 2020, which has formed part of the committee review. Staff have also looked at survey data sent to participants who attended the new member committee night.

Conclusion:

The approach to training and onboarding will be continuous and with each iteration the Office of the City Clerk will be tweaking the output based a review and the any survey data from the last iteration. The Office of the City Clerk will also keep in mind trends and other jurisdictions to find new program opportunities or ways enhance current programs.

Respectfully submitted,

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City Clerk

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Report Approval:

All reports are reviewed and/or approved by Department Director, the Chief Financial Officer and the Executive Director of Legal Services & Corporation Counsel.