

Starting the Term off on the Right Foot

Lessons Learned for Effective Council Orientation and Onboarding

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City of Ottawa

Overview



Ottawa's experience with the 2022
Transition and Orientation



Council Transition

New Members
Returning Members
Outgoing Members



New Member Orientation



Swearing-in and first meetings

Goals of Council Transition and Orientation

- ✓ Enable Members to govern effectively and confidently from the start
- ✓ Clarify roles, responsibilities, and boundaries
- ✓ Promote lawful, ethical, and transparent decision-making
- ✓ Support positive Council and Council-staff relationships
- ✓ Prepare Members for practical demands
- ✓ Preserve institutional knowledge and ensure continuity across terms
- ✓ Establish a strong governance culture and foundation for ongoing learning

Overview of Ottawa's Approach

- Clerk-led project, with corporate-wide support
- Transition supports tailored to new, returning, and outgoing Members
- Coordinated calendar of transition activities before voting day (retiring members) and after voting day (new, returning and departing members)
- Focused and prioritized orientation program
- Robust term of Council governance review process
- Review and continuous improvement over successive terms

2022 Council Transition in Ottawa

- Transition shorter by 2 weeks
- New Ward Boundary structure (+1 Council seat for total of 24 Councillors + Mayor)
- New Mayor after retirement of 3-term Mayor
- 11 new Councillors, 13 returning
- No defeats
- City Manager departure within first 2 weeks of new term



Newly-Elected Members – Initial supports

- Welcome letter
- Introductory meeting & Tour
- Orientation package
 - Orientation Manual
 - Ward-specific info
 - Schedule of orientation and transition events
- Staff liaison “buddy”



New Members – Onboarding and Administration

- Payroll, pension and benefits onboarding
- Hiring and onboarding political staff (if applicable)
- Security access, parking pass
- Office or workspace set-up
 - Artwork
 - New furniture if needed

Name _____

Signature _____

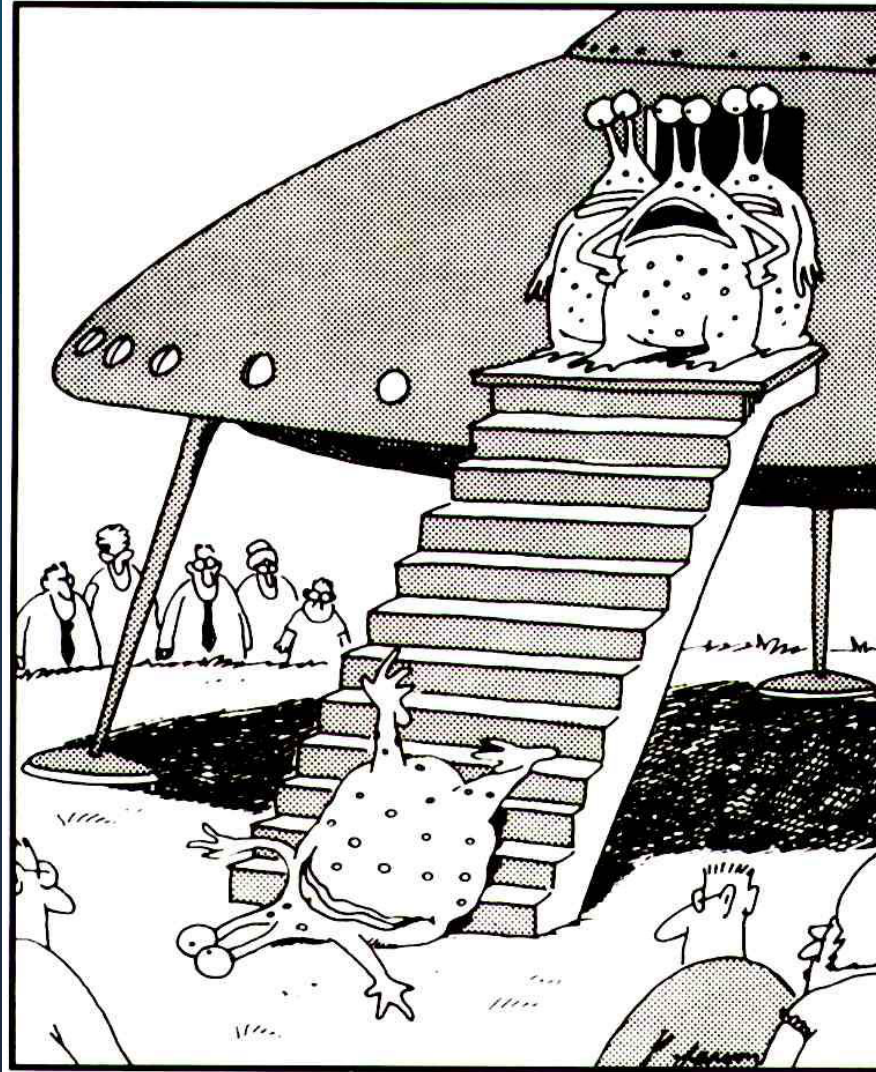
Date _____





New Members – Technology

- Email address
 - Consider temporary transition e-mail
- One-stop technology setup
 - Smartphone device options
 - IT support to set up accounts
 - Make it easy
- Technology Credit



"Wonderful! Just wonderful! ... So much for instilling them with a sense of awe."

Lessons Learned

- First impressions matter
 - This is a new Member's first impression of how the organization functions
 - Put yourself in their shoes
 - Sweat the small stuff
- Reduce friction for new members
- Start planning early
- Ensure organizational support

Ottawa

City Hall
Hôtel de ville

110 Laurier Ave. West
110, av. Laurier Ouest

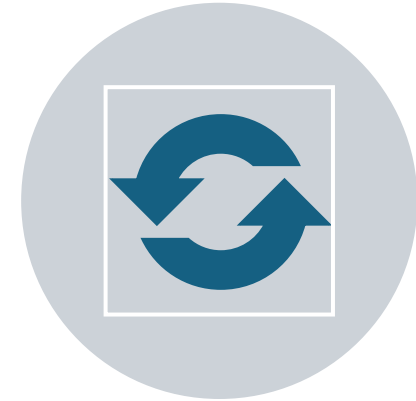
Council Orientation



1 – CORE ORIENTATION
SESSIONS



2 - DEPARTMENT AND
SUBJECT-SPECIFIC BRIEFINGS



3 – ONGOING ORIENTATION
AND REFRESHER TRAINING

Core Orientation ("Council School")

- Legislative Framework/ Role of Councillor
- Procedure By-law 101
 - Orientation to Council Chambers and meeting technology
- Finance and Budget 101
- Planning 101
- MFIPPA and Casework
- Accountability Framework & Code of Conduct (Integrity Commissioner)
- Briefings on major Project & time-sensitive files



Other activities

- Media Training
- Invitation to observe any Council/ Committee meetings
- Learning from Departing or Returning Members
- Consultations on Governance Report
- Team-building
 - Support consideration of closed meetings implications
- Extra support for Head of Council

Ongoing Orientation and Learning

- Department and subject-specific orientation
- Procedure By-law 102 / Chair training
- Training for Members's assistants (if applicable)
- Technical briefings/ orientation sessions before major items
- Mid-Term refreshers/ learning bites

A close-up photograph of a firefighter in orange protective gear. The firefighter is holding a black fire hose nozzle, from which a powerful, bright white stream of water is being discharged. The background is slightly blurred, showing more of the firefighter's gear and a hint of an outdoor setting.

Lessons Learned

- Prioritize ruthlessly
- Earlier orientation sessions should focus on “Day 1 ready”
- Be mindful of Members’ schedules and information overload
- Consider hot files and time-sensitive items
- Invite Returning Members
- Seek feedback

The nearly departed - Outgoing Members



HR offboarding –
pension and transition
entitlements



IT assets, keys, passes
etc.



Deadlines for final
invoices and associated
disclosure and
documentation



Office space cleanup
and reset



Information
management and data
destruction



Lessons learned

- Engage retiring members early
- Checklists, Checklists, Checklists
- Assume they won't read your checklists
- Establish standard procedures to support the end of term
 - Asset inventory
 - Elected Officials Records Management Policy & Procedures

Elected Officials Records Management Policy

- Applies to all Members of Council
- Ensures proper creation, management, retention, and disposal of records related to City business
- Supports accountability, transparency, and the City's duty to document & protection of constituent privacy
- Addresses managing records during the term of Council and includes protocols for Managing records at the end of a Member's time in office
- City Clerk provides direction and oversight



Managing Records at end of Term

- City records must be provided to the City Clerk before leaving office
- Members' constituency, personal or political records are not retained
 - Outgoing Members should ensure that all personal information and all constituency matters, lists, files, correspondence personal notes, etc. are removed from their office.
 - Constituency records/ Personal information collected cannot be shared with incoming Members without consent of constituent
- Historically significant records and gifts may be transferred to City Archives
- City-issued devices: Members may purchase and retained. If not retained, data is securely wiped after term ends

Declaration of Office & 1st Meeting

Municipal Act , 2001

First Meeting

230 The first meeting of a new council of a municipality after a regular election [...] shall be held at the time set out in the municipality's procedure by-law but in any case not later than 31 days after its term commences.

Deemed organization

231 A new council of a municipality shall be deemed to be organized after a regular election [...] when the declarations of office under section 232 have been made by a sufficient number of members to form a quorum.

Declaration of office

232 (1) A person shall not take a seat on the council of a municipality, [...] until the person takes the declaration of office in the English or French version of the form established by the Minister for that purpose.

Condition for conducting business

232.(5) No business shall be conducted at the first meeting of a council until after the declarations of office have been made by all members who present themselves for that purpose.



Ottawa's ramp-up approach

- Individual official declarations of Office before November 15
- First Council meeting includes ceremonial declarations and opening remarks from the Mayor
- First “business” meetings
 - Adoption of the Governance report
 - Nominating Committee
 - Confirmation of budget process
 - Routine business starts up in the new year

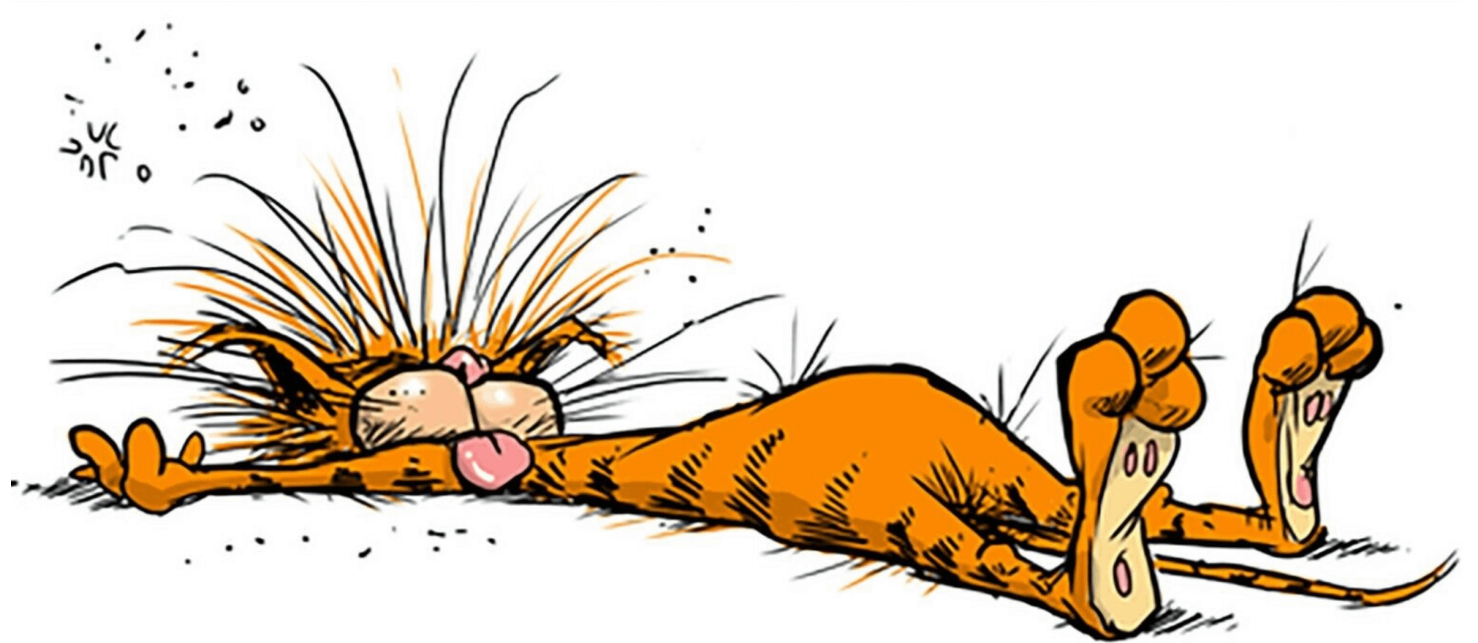


Lessons Learned

- Check your Procedure By-law re first meeting
- Have a plan – but be flexible
- Where possible, establish a regular cycle for governance review
 - Beginning and mid-term works well
- Tightly manage the legislative agenda and calendar for the first part of the term

Final Thoughts

- Transition is a project
- Start now!
- Build your team
- Consider the human factor
- Get help...and some sleep if possible



Unnamed Clerk the morning after Election getting ready to meet the new Councillors