

Policy Development 101

October 16, 2019

10:00 – 11:30 MDT

*See GFOA Alberta (in Alberta) and
Bloom CME (outside Alberta) Websites
for Registration Details*

<https://www.gfoa.ab.ca/events.php>

<https://bloomcme.com/education/>



It is fundamental for municipalities to have policies in place. Learn the basics of policy development and how to create effective policies that make a difference!

- ✓ **Policy Defined.** Learn the basic meaning of policies and how they can shape positive outcomes.



- ✓ **Best Practices for Policy Development.** Best practice components for policy development and how to use them to guide quality creation.

- ✓ **Policy Wheel.** Learn how to use the “policy wheel” to develop, deliver and assess your policy effectiveness.

- ✓ **The “Must Have” Financial Policies.** A menu of must have financial policies for municipalities in the order of importance. Prioritize! They cannot all be written at once.

Communicate policy effectively!

- ✓ **Clear and Concise Policies.** Tips for writing financial policies that hit the mark! Less can be more is essential when writing policy that will be read and utilized effectively by stakeholders.



- ✓ **Policy engagement and communication.** Learn how to involve stakeholders in the development of policy and communicate policy in an engaging way to improve organizational “buy in”.

- ✓ **Corporate Policy Management.** Policy success is dependent on good policy management. Learn the 5 key steps to managing policy in an effective way.

- ✓ **Policy and Change Management.** Change is challenging and limitation of new policy can be difficult. Strategies and tips to bring ease to the change process and to communicate policy effectively.

Prioritize policies for organizational effectiveness and project planning!

- ✓ **Policy as a Project.** Develop a project plan to tackle policy development. Who, what, how, when? Plan for policy development success.



- ✓ **Three Key Financial Policies Reviewed – templates provided.** 1) Debt Management 2) Reserves 3) Year End Surplus.

- ✓ **Strategy, Goals and Policy.** Reach organizational goals through effective policy that guides and enables.



- ✓ **Effective Communication of Financial Policy to Council and the Public.** How to's of engaging policy communication.

Course Co-Creator/Instructor
Tim Duhamel

- ✓ Tim Duhamel is the **founder and President of Bloom Centre of Municipal Education**.
- ✓ He is a municipal veteran whose **career has spanned over 21 years**. He has been a proud member of GFOA Alberta since 1998.
- ✓ **His passion is creating educational material and conducting lectures for municipal professionals**. He has lectured as far away as Kiev, Ukraine for the Federation of Canadian Municipalities. Tim is the lead creator of education material and course delivery for Alberta GFOA.



- ✓ His **municipal consulting practice** has numerous repeat clients in Alberta with ongoing projects ranging from:
 - **General mentorship and in-house training**
 - **Strategic planning (Council, Executive Team and department workshop facilitations)**
 - **Leadership training, team building, Council/Admin relationship**
 - **Process improvement reviews, change management, municipal scans, service reviews**
 - **Financial plans, feasibility studies, priority reviews, long term operating and capital plans, priority-based budgeting, forecasting**
- ✓ Tim is the former:
 - **Manager** of Financial Planning for Strathcona County
 - **Chief Administrative Officer** for the Town of Bruderheim
 - **General Manager** of Community and Protective Services for the City of Spruce Grove

Contact Info

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Course Co-Creator/Instructor
Hugh Bell

Hugh Bell is an associate of Bloom CME providing educational workshops and consulting services.

In his 13 years as a Treasury and Risk Manager with Strathcona County, Hugh developed several treasury policies including investment, debt, reserves, and risk management.

He managed all **treasury operations** including the planning, budgeting, forecasting, performance reporting, as well as the accounting and controls.

Recently he has provided **consulting on financial policies** as well as **Utility bylaw reviews** for municipal clients.



Hugh is a past member of GFOA, a recent graduate of the McGill executive mini MBA program, and has a CIM designation.