

A Review of the B.C. Board of Examiners Program

by

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Bachelor of Arts, from University of Victoria, 2000

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EXECUTIVE SUMMARY

Objectives

The central goals of the report were to review the Board of Examiners (BOE) program, confirm the challenges the BOE had identified concerning its certificates, probe for other challenges, research the subject of competency for possible use in the certificate framework, and provide a long term strategy to revise the BOE program.

Background

The Board of Examiners is an independent statutory body established under the *Local Government Act*. The administration of the BOE is undertaken by the Ministry of Community, Sport and Cultural Development. The BOE's principal goal is to recognize and improve the professional skills of British Columbia's local government employees.

Methodology

There was a broad mandate to review the BOE program, therefore a variety of primary and secondary research methods were used. The primary research consisted of a consultation piece targeted to Board of Examiners stakeholders. This included two focus groups with local government managers and chief administrative officers, interviews with local government elected officials, and a survey of local government employees. The secondary research consisted of a jurisdictional scan in local government employee certification, and a literature review that focused on the subject of competency.

Literature Review

The popularity of competencies in the public and private sectors, and the possibility that competencies could address the current challenges in the BOE program, provided the drive to pursue a competency model option. Based on the literature and the latest best practices, a workable competency model would require these essential points: the model must consider the organizational context and link to evolving organizational goals; competencies must be rigorously researched, include employee involvement, and be validated every step; competencies must link to human resource systems and performance management; and the model must be regularly evaluated and updated.

Through investigation of the literature, it became apparent that using competencies and creating a competency framework is not appropriate for the Board of Examiners certificates for the following reasons: there is no legal connection between the Board of Examiners and local government human resource systems; the BOE certificates are not concerned with behaviours or outcomes; it is more appropriate for a local government association or an individual local government to create a competency model; and at best, any notion of competencies for the BOE would be symbolic and possibly misleading.

Jurisdictional Scan

Compared to other provincial local government employee certification programs, B.C. is unique in its delivery and comprehensive in its content. Key points from other jurisdictions include: an ethics component for all certificates, a mandatory certification program in

Saskatchewan, and a strong partnership between five provinces in the University of Dalhousie and University of Alberta's Local Authority Administration program.

Findings

The consultation piece involved two focus groups with local government managers, interviews with elected officials, and a general survey of local government employees. The challenges of course equivalency, course availability and school accessibility that initiated the review of the BOE program were confirmed and new challenges, primarily time constraints, were identified. Feedback from the focus groups and interviews offered new skills and knowledge required for local government employees and management, predominantly in communications and ethics. Survey respondents also provided information on their perception, as well as misconceptions, of the BOE program.

Recommendations

The 19 recommendations are formed around the report objectives and principles and are divided into three sections: short term actions, medium term actions, and long term considerations. Each recommendation is not necessarily mutually exclusive but they are presented individually for the Board of Examiners to consider on their own merit.

Short term actions can be implemented through a change in policy:

- 1 – Maintain consistency in the basic certificate structure
- 2 – Increase promotion of the Board of Examiners
- 3 – Continue scholarship awards
- 4 – Negotiate a study at work policy
- 5 – Add an ethics component to one or more existing course(s)
- 6 – Remove redundant core course 9 (Ethics) and add courses in demand
- 7 – Remove references to specific institutions in Policy 1
- 8 – Create and maintain a list of equivalencies for UVic DPSM/DLGM courses
- 9 – Remove redundant core course 7 (Law) and add courses in demand.

Medium term actions can be implemented through a change in regulation:

- 10 – Add an ethics component through an additional core course
- 11 – Allow the use of approved non-credit courses for 'other' required courses
- 12 – Remove references to UVic DPSM/DLGM courses
- 13 – Remove redundant course 5 (Management) and add courses in demand
- 14 – Additional core courses for all certificates.

Long term considerations are major changes to the BOE program for the Board to consider:

- 15 – Create a Basic Certificate in Local Government for applicants who are not employed by local governments
- 16 – Re-certification / professional development endorsement
- 17 – Increase number of scholarships awarded
- 18 – Examination as core course equivalency
- 19 – Mandatory certification for local government managers.

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DEDICATION

I can't begin to express the love I have for my wife Chika, and my son Kento. They are my motivation, my rock, and my life. This report is dedicated to them in the hope that it is one step forward for all of us.

INTRODUCTION

The past six years have been a time of growth and change for the Board of Examiners (BOE), the local government communities and the B.C. post-secondary institution landscape. The arrival of new institutions and local government courses has led to challenges with course equivalency, course availability, and school accessibility issues, as they relate to the Board's certification program. B.C. post-secondary institutions are offering more credit courses for BOE certification and applicants are seeking direction regarding course equivalency. In light of the current environment, the BOE wants to pursue a review of their program and guiding legislation, the 2005 *Local Government Employees Certification Regulation*.

The central goals of the report are to review the BOE program, confirm the challenges the BOE has identified, search for other issues not already identified by the BOE, research competencies for possible use in the certificate process, and provide a long term strategy to move the BOE program forward in order to achieve seven objectives and principles:

- 1- To address the challenges concerning the BOE program identified in this report;
- 2- To ensure that the BOE program remains viable, beneficial, and a sought after option;
- 3- To keep the certificates simple and easy to follow;
- 4- To make the BOE certificates accessible to as broad an audience as possible;
- 5- To make the educational requirements for BOE certificates as broad and flexible as possible;
- 6- To equip local government staff with the necessary skills and education to give good and reliable advice to Councils and Boards; and
- 7- To provide certification that appropriately recognizes local government employee achievements.

After this Introduction, the report is structured as follows: The first section provides the structure and background of the B.C. Board of Examiners. The second section provides an overview of the methodology used in the report. Section three consists of a review of the literature on competency. Section four is a jurisdictional scan examining local government employee certification primarily in other provinces. Section five summarizes the consultation findings. Section six weaves the findings and other sections into a discussion on what to address in the BOE program and ways for the Board to move forward. The final section will offer recommendations to revise the BOE program.

BACKGROUND: HISTORY OF THE PROGRAM

Structure

The Board of Examiners (BOE) is a statutory body established under the *Local Government Act*, Division 3 of Part 5.1, and sections 204-206. Under section 206, Cabinet adopted the *Local Government Employees Certification Regulation*, Reg. 324/2005. The administration of the Board of Examiners is undertaken by the Local Government Department in the Ministry of Community, Sport and Cultural Development (see Appendix A). While the Board of Examiners is an independent body, it is administered through the Ministry rather than an outside association.

The BOE's principal goal is to recognize and improve the professional skills of British Columbia's local government employees. The three member Board is appointed by Cabinet with a representative from the Local Government Management Association (LGMA); the Union of British Columbia Municipalities (UBCM); and the Ministry of Community, Sport and Cultural Development. There is an administrator for the day-to-day affairs of the Board, such as handling certificate and scholarship applications, keeping records, and supporting the Board meetings.

The Board of Examiners meet quarterly every year to review successful applications and approve or deny certification, set future policy, and other duties as required. The BOE reviews applications from clients desiring certification at four different levels: Local Government Service Delivery, Local Government Administration, Local Government Statutory Administration and Local Government Executive Management. While the certificates are not requirements for local government employment, they are generally looked upon favourably. The BOE *Regulation* and policies can be found in Appendix B.

History of the Board of Examiners

The Board of Examiners in BC has a rich history dating back to 1943. Much of the following information comes from chapter 8, section XIII of Benjamin Charles Bracewell's (1970) unpublished book on local government in B.C. Bracewell was the third deputy minister of the Department of Municipal Affairs, from 1945 to 1954.

A resolution was passed in 1943 by the Municipal Officers Association of British Columbia (MOA), which was the precursor to the current Local Government Management Association of BC (LGMA), asking the province to consider developing an educational program for those desiring to enter local government. This was an effort to improve the reputation and efficiency of those appointed to municipal employment.

A memo was prepared for a joint committee consisting of the then Department of Municipal Affairs, the Union of British Columbia Municipalities (UBCM) and the MOA. The memo read, "That courses of various kinds be established in conjunction with existing educational institutions and be designed to further the object of ensuring that persons appointed to municipal administrative posts shall have the necessary training,

[and that those courses be tied in with Post-War rehabilitation plans].” (p.19, Chapter 8, Section VII)

In 1944 legislation was passed creating Part XXIV of the *Municipal Act* (Statutes of B.C. 1944, c.35, s.27, p.127). The newly created Board of Examiners had the power to make new regulations within its authority over administrative officers. The Board could give out certificates as well as make and hold examinations for those desiring certificates.

The original Board of Examiners had a three person board consisting of one member appointed by UBCM, MOA, and the Minister of Municipal Affairs respectively. The earliest recorded Board minutes are from July 23rd 1948 when a public meeting was held to discuss formulating regulations for the Board as well as the scope of the certifications. Local governments were invited to attend and share their views (July 23rd 1948 minutes). Bracewell was the Chair of the Board. The BOE *Regulation* was approved under Order-in-Council on February 26th, 1952. By the January 9th 1953 Board meeting, 97 applications had been submitted, with 22 certificates approved. These initial applications were from administrative officers already employed by local governments. Until an educational course could be created and examinations held, it was enough to be employed.

Bracewell wrote, “It is conceivable that a Board of Examiners could operate without a Municipal Educational Course being in existence, but due to the fact that municipal legislation is provincially enacted, it is preferable that such a Course be in existence within the Province.” (Bracewell, 1970, p.46, Chapter 8, Section XIII)

Bracewell observed at the time that it was (and it remains) difficult to bring together, and judge, theory and practice. Specifically, someone who scores high marks in theory could be mediocre in practice and application of the theory. The Board, through consultation with MOA, UBCM, and the University of British Columbia (UBC), created a program at UBC called the “Municipal Education Course”. Before this course was created, education regarding local government was through lectures in a commerce class at UBC, often involving a guest lecturer (quite often it was Benjamin Bracewell himself). The course was created through the enabling legislation in the *Municipal Act* and the course would cover a specified field to not overlap with existing diplomas from independent educational institutions.

Challenges were evident from the beginning in the Municipal Education Course. A major challenge was the lack of a textbook written in the B.C. municipal and provincial context. Another challenge was maintaining the level of funding from the provincial government. A final challenge was drumming up enough interest to have a strong contingent of students in the course. Because of these initial challenges, the course did not open its doors until 1953, when it became available at UBC through the School of Commerce. It was a four year program with courses in Administration, Accounting, and Law, and a three year course in Economics. See Appendix C for the outline of the Municipal Education Course. These courses helped municipal administrators find solutions that

are/were economically sound, legally possible, and politically feasible (UBC Calendar, Municipal Administration Diploma Course, 1953).

It is interesting to note that in the June 13th 1955 Board meeting there was a motion carried in an attempt to make the BOE certificates mandatory for clerks, treasurers or any other senior position. A temporary work permit would be issued while courses were undertaken or while gaining work experience. The mandatory certificate was approved at a 1956 Board meeting. It was to be called the Certificate of Proficiency and “was to be the evidence of competency recognized for municipal office in the Province of British Columbia.” (May 28th, 1956 Board minutes) The mandatory certificate for employment was to be in effect after September 1st 1963. This was approved and came into effect through B.C. Reg 49/58. The wording in the *Regulation* was, “After September 1st, 1963, no person is deemed to have attained a standard of proficiency necessary for municipal office as: [position title] unless he has been granted a [certificate title].” However, neither the *Regulation* nor the powers of the Board as legislated through the *Municipal Act* provided the authority to enforce this claim. The Board of Examiners *Regulation* was amended again in July, 1970 but the ‘mandatory’ certificate clause remained.

There were changes to the Board of Examiners legislation in 1957 and 1960. The 1957, c.42, s.823. *Act Respecting Municipalities*, repealed the power to grant certificates without an examination to people who currently held local government positions or were on a leave of absence for the war. In the *Revised Statutes of 1960, Municipal Act Part XXVI, c.255, s.816*, the change was in regards to the Board having the power to establish standards for municipal *employment* [instead of *officers*].

At the Municipal Officers Association 27th Annual Conference in 1966, it was remarked by the Executive that senior positions in local government were being filled by people without Board of Examiners certificates. Some of these people had no municipal experience in British Columbia. Bracewell stated it was in the local government’s best interests to give favourable consideration to someone who passed the Municipal Education Course (Bracewell, 1970).

By 1967, 232 people had received a BOE certificate since the Board began issuing them in 1952. 10 people received certificates in 1966-7, representing 65.4% of the people taking the Municipal Education Course at UBC. Unfortunately, the Municipal Education Course was not self-sufficient as it relied on the provincial government for funding. The UBC program funding supplied by the provincial government was cut in 1965, and the Board looked at alternatives with the Chartered Institute of Secretaries, with no success. At the March 27th, 1968 Board meeting, the Board agreed to phase out the Municipal Administration Course, with the last students entering the Course in 1967-8. The last graduates were in 1972 (Municipal Officers Association, 1972).

Jim Baird, former Deputy Minister of Municipal Affairs, spoke about the benefits of education during the MOA Annual Conference in 1972:

“Back in 1957 when I first became acquainted with the peculiarities of some municipal officers and with some peculiar people who were acting as such, the number of fully qualified officials was not too high. However, since the Municipal

Administration Course was instituted by the University of British Columbia at the insistence of the Department, many in the employment of municipalities have taken advantage of the Course. The results have been excellent and the standard of those in office has continually improved to the benefit of the public at large.” (Ibid, p.36)

After the UBC Municipal Education Course was dissolved, a number of other schools and institutions offered their own programs or courses. In 1972 they included the Certified General Accountants Association (CGA), the Chartered Institute of Secretaries (CIS), the BC Institute of Technology (BCIT), Malaspina College, the College of New Caledonia, and eventually Camosun College and the University of Victoria (UVic).

In 1980 the Municipal Administration Education Council and Advisory Committee to the Board of Examiners recommended that the diploma programs in Public Administration at Camosun College, Malaspina College and BCIT be approved for certificates in Municipal Administration, and they were indeed approved.

In 1982 the BOE *Regulation* was reviewed and a new *Regulation* was drafted, B.C. Reg 481/82. The reason for the review was that the *Regulation* had not been revised for 14[sic] years (BOE OIC, 1982). Items that were changed in the *Regulation* included:

Table 1 - List of Changes to Board of Examiners 1982 *Regulation*

| Removals | Additions and Changes |
|---|---|
| 'Mandatory' clause for certification | Acceptable qualifications from any recognized Canadian institution were added |
| References to UBC courses no longer in existence | Certificate titles were changed from 'Junior' to 'Intermediate' |
| References to a certificate in property appraisal were out of date since the establishment of the BC Assessment Authority | |
| References to procedures for examination, since no examinations were taking place, only the awarding of certificates based on course work approved by the Board | |
| References to "British" subjects and a "21 year" age requirement. At first it was changed to "Canadian citizen" and "19 years of age" when the new <i>Regulation</i> was being drafted, but was removed entirely by Legislative Counsel as being irrelevant | |

There is evidence of an interesting comment by Ken MacLeod, then Director of Research, in May 1980 on the subject of *Regulation* changes while they were being drafted. He suggested using the certificates as instruments to police a Code of Ethics, since under the *Municipal Act* a certificate could be removed because of gross negligence.

Communications with other provincial ministries in 1981 regarding municipal certification revealed that only Saskatchewan had mandatory certification for municipal

employees in municipalities with populations over 1000. Many other provinces had certificates recognizing professional development, and had municipal courses offered through an association or university, with certificates often being provided by the association.

Changes to the BOE *Regulations* in 1982 were done in consultation with members of the Board of Examiners, the Municipal Administration Education Council of the Municipal Officers Association of BC, Ministry Senior Legal Advisor and Director of Policy and Research, and the Provincial Office of the Legislative Counsel.

In 1990 a new *Regulation* was drafted as Reg. 83/90. The reason for this review was to recognize the expanding job roles and responsibilities of municipal employees (OIC Info Sheet, 1990). There were three major changes during this review:

- The two existing certificates were expanded to become four distinct certificates. The older titles were Intermediate and Senior Administration certificates. The new titles were Intermediate Certificate in Municipal Administration, Senior Certificate in Municipal Administration, General Certificate in Municipal Management, and Advanced Certificate in Municipal Management
- The new MOA Intermediate Education program, which consisted of the four core courses, were offered through Camosun College (Mary T. Lee, personal communication, Dec 5, 1989)
- An introduction of new course requirements for the certificates from the University of Victoria, namely ADMN 312, 445, 452, and 465.

In 2000 there were minor *Regulation* amendments. References to the *Municipal Act* were replaced by the *Local Government Act* through the 1996 *Consolidated Regulations*. The changes to the 2000 *Regulation* were mostly cosmetic and concerned updating three names and titles. The first change was that references to MOA were changed to LGMA, the new association name. The second change was to change the term 'Municipal' to 'Local Government' in reference to the certificates. The final change was that specific job titles were updated to 'corporate/financial administration' instead of 'clerk', 'secretary', and 'treasurer'. All of which reflected changes to provincial legislation.

In 2003 the *Community Charter* came into effect and during its drafting the BOE initiated a review of the BOE *Regulation* in July 2002. There were several stated reasons for the review. First, it had been more than 10 years since the previous major review of the BOE *Regulation* in 1990. Second, there was an increase in relevant courses in the B.C. educational landscape. Finally, the upcoming *Community Charter* had consequences for local government employees. Specifically they would be called on more frequently by their Councils as policy advisors because of the broad empowerment of the *Charter*.

Three principles guided this latest discussion for *Regulation* changes. First, the Board wanted to provide local government employees with the necessary skills and education to give good and reliable advice to local government Councils and Boards because of the new choices available under the *Community Charter*. Second, the Board wanted to assist local governments to recruit and develop staff by providing clear career paths. The third

principle was the Board wanted to provide local government employees with educational options that are useful and provide certification that appropriately recognizes their achievements.

With those guiding principles, some key areas of interest for *Regulation* amendments that were identified in the 2004 BOE discussion paper were:

- a need for flexibility in course requirements
- a need for recognition of non-statutory staff
- are the “right” courses being offered that will meet the greater capacity of local government employees in the context of the *Community Charter*
- incentives are needed for local government employees to take courses
- identify a clear career path
- open up requirements to get potential employees into the system
- certification should be a sequential program
- certification courses need to assist competencies increasingly required by staff
- recertification
- province to province recognition
- to move from a mechanistic approach to one of making the courses relevant to the job: leadership, management skills, policy skills, negotiation skills, people (communication) skills, etc (BOE 2004).

These guiding principles and key areas of interest helped form the recommendations for change reflected in the 2005 *Regulation*.

When the draft *Regulation* was ready and the BOE sought approval, a July 11, 2005, briefing note read, “The Board has reconceptualised and modernized the certification program with greater emphasis being placed on making the certificates grounded in a competency basis. This has been achieved by making the course requirements more relevant to the job combined with demonstrated related work experience.” It is important to note that there was no further explanation of which definition of ‘competency’ was being used, nor what ‘competency’ implied overall.

During the 2005 *Regulation* review, the Board consulted with a number of practitioners and educators in the local government field. The major stakeholders were the Ministry of Advanced Education, Capilano College, University of Northern BC (UNBC), UVic, LGMA, and the Board itself. They discussed the basic skills required and the quality and applicability of courses necessary for certification.

Since 2005 the B.C. post-secondary landscape has continued to evolve, with more institutions gaining university status, and institutions are offering potentially equivalent courses to those established in the 2005 BOE *Regulation* and policies. Meanwhile, according to applicant feedback received by the BOE administrator, UVic has recently not been able to consistently offer the required core courses for the management certificates that are in demand by students of local government.

Currently, the six post-secondary institutions that offer the four core courses, or equivalent, for the BOE certificate in Service Delivery are Camosun College, Capilano University, College of the Rockies, NorthWest Community College, University of Northern BC and the University of Victoria. While Capilano University offers one core course for the management certificates, the University of Victoria is the sole institution that fully offers the other core courses required by *Regulation* and BOE policies for the management certificates in Administration, Statutory Administration, and Executive Management.

Partners and Players of the BOE

The BOE works in partnership with three main groups: UBCM, LGMA, and B.C. post-secondary institutions. UBCM administers the scholarship programs and has a representative on the Board. LGMA has provided advice and support since the BOE's inception and they have a representative on the Board. The BOE relies on a strong relationship with post-secondary institutions to keep required courses offered. Beyond the six institutions described in the previous paragraph, other B.C. institutions are important for their relevant credit course offerings and their potential to offer new courses in the future.

The other important players in the BOE are the remaining stakeholders. These are the local governments, the employees of local governments, students in local government, and relevant organizations such as CivicInfo B.C. and the Municipal Financial Authority of B.C. (MFA).

Conclusion

The B.C. Board of Examiners has a rich history dating back to 1944. While the program has gone through different iterations, the core has remained the same. The BOE program is defined by several key points: a desire to improve and recognize professional development in local government; a decentralized delivery with multiple learning institutions; an emphasis on course work and experience; a non-mandatory certification process; a four way partnership between UBCM, LGMA, the Ministry of Community, Sport & Cultural Development and post-secondary educational institutions; and regional opportunities to pursue certification.

METHODOLOGY FOR THE PROJECT

This project was initiated to review the Board of Examiners program after equivalency and course availability issues were raised by applicants to the certification process, along with a changing post-secondary educational landscape, and a desire from the Board to broaden the applicant base and make the certificates more attractive for local government employers and employees.

Because of the broad mandate to review the BOE program, the researcher decided that using a variety of research methods to achieve the report's objectives was appropriate. The research component of the project includes both primary and secondary research. The primary research consists of a consultation piece targeted to the main Board of Examiners stakeholders, including focus groups and a survey of local government employees. The secondary research consists of a jurisdictional scan of local government employee certification and a literature review focusing on competency.

Literature Review

A literature review was initiated to provide an understanding of the main theories, controversies, and practices that relate to competence and competency in human resource management and performance management. The literature review examined academic publications and reports concerning the definitions and spheres of competency, the evolution of competency theory in North America, competency models, and how to put competency theory into practice. The University of Victoria Library website and Google Scholar were the primary tools to initiate the literature review. Key word searches using 'competency', 'competency framework', 'competency in local government', and 'competency models' were first used to find related documents. After reading and sorting articles, the first round of article's references and works cited were used as a jumping board to the next round of articles and sources. Also, Google Scholar was an excellent tool to determine the number of times a work was cited to assess aggregate scholarly value and popularity.

Jurisdictional Scan

A jurisdictional scan is included to determine what other governments and associations are doing in practice concerning local government employee certification. The jurisdictional scan primarily looked at Canadian provinces and territories. Because Canadian provinces share the same constitutional status, Charter of Rights and federal structure, there is some common ground across local governments. There is also significant overlap through shared post-secondary institutions, shared practices amongst local government associations, and shared practices in legislation. Other specific countries were examined as to how they approach certification of local government employees. The scan also included a sampling of competency based local government frameworks from selected countries, in order to investigate how their competency frameworks tie into human resource management systems. Beyond Canada, the other countries that are briefly examined are: the United Kingdom, Australia, and the United States.

Data sources for the jurisdictional scan consisted of searching through website records and online documents. The Canadian jurisdictional scan also looked at provincial government websites, specifically departments dealing with local government affairs, provincial legislation concerning local government employees, and provincial local government associations.

Consultation with Stakeholders

A consultation piece was initiated to gather feedback from BOE stakeholders in order to determine program changes that are desired, relevant, and politically feasible. The BOE has four main stakeholders: local governments, students, post-secondary institutions, and the Ministry. Consultation with these stakeholders is essential for any kind of substantial *Regulation* review. The consultation consisted of a series of focus groups, personal interviews and a survey of local government employees. The focus group participants were gathered from local government managers. There were two separate focus groups, local government Chief Administrative Officers (CAO) and local government managers below the CAO level (called middle managers for the remainder of the report). The interviews targeted long-standing municipal elected officials. The survey focused on local government employees and students in local government courses, assessing their perceptions of, and experience with, BOE certificates. Post-secondary institutes were not involved and they are discussed in the Limitations section.

Focus Groups

As part of the BOE program review it was important to receive feedback from stakeholders. Managers were in the best position to know what was needed or required for local government employees in terms of training and development. In order to achieve a broad perspective, it was decided to have two types of focus groups. The first group was for middle managers, such as department heads or corporate officers. Middle managers could comment in their roles as supervisors to general staff, as well as subordinates to Chief Administrative Officers. The other group would consist solely of CAOs, who could provide feedback from a top-down perspective.

The focus group questions were designed in consultation with the Chair and administrator of the Board of Examiners, and approved by the other two members of the Board of Examiners. During the design phase the focus group questions had more emphasis on the subject of competency. After the literature review conclusion, the emphasis of the questions shifted to skills and knowledge and other potential changes to the program.

The participants were chosen from a pool of 160 CAOs and hundreds of managers with recommendations by LGMA, who could suggest qualified and willing local government officers. This method was chosen because a random phone call soliciting participation (cold calls) was deemed inefficient and unreliable. LGMA provided a list of ten potential participants for each of the two groups, consisting of people from across the province working in different community sizes for a varied outlook on local government. Using the focus group invitation script, LGMA facilitated the introductions through their association's email. Following the introductions, direct email requests for participation in

the focus group were sent, including the consent form and instructions on how to participate. A few rounds of communication and scheduling resulted in seven participants in the middle manager focus group and six participants in the CAO focus group. The participant consent forms were signed, scanned and returned.

Focus Group Preparation

One week before the scheduled focus group session the participants were sent a primer document that contained four key pieces of information (see Appendix D). The first piece was a brief overview of the Board of Examiners, explaining the role of the BOE and the four kinds of certificates. It also included a link to the BOE website and participants were encouraged to look over the *Regulation* prior to the session. The second piece was the working definition of ‘competency’, even though after concluding the literature review the notion of using ‘competency’ in the BOE *Regulation* was dismissed. Therefore the working definition at the time of the focus group was the following:

‘Competency’, for the purpose of the report, is focused on skills and knowledge:

- Skills and Knowledge can be taught
- Skills and Knowledge are *not* generic (i.e. reading and writing)
- Contextual, that is, skills and knowledge specific to *local government*
- Related to the business needs of local government

The third piece of the primer document was the list of topical questions for discussion. The final piece was the call in procedure for the teleconference call.

Elected Officials’ Interviews

Although not a direct stakeholder with the Board of Examiners, consulting with elected officials was still considered beneficial. Councils hire Chief Administrative Officers and they also have input into what is required or desired in the CAO position. A focus group was considered more difficult to organize with elected officials, therefore interviews were chosen for this group. Interviews proved more effective for elected officials, because they could speak for half an hour individually, rather than one hour or more collectively. The interview questions were designed in consultation with the Chair and administrator of the Board of Examiners, and approved by the other two members of the Board of Examiners.

Because there are approximately 1,200 elected officials at the local level in B.C., UBCM was approached to provide a list of possible contacts, much as LGMA did for the focus group participants. Several names were forwarded by UBCM based on length of service, experience, willingness to participate in studies, and community size. From the list of recommendations, three participants chose to be interviewed over the phone. They signed, scanned and returned their consent forms prior to the interview.

Employee Survey

The survey was hosted by CivicInfo BC. The survey questions were designed in consultation with the Chair and administrator of the Board of Examiners, approved by the other two members of the Board of Examiners, and received final approval from the Assistant Deputy Manager of the Ministry. There were seventeen questions in total, the first seven questions were demographical and the latter 10 questions were specifically about the Board of Examiners.

The survey was sent to 1,447 people through email. LGMA and the six B.C. post-secondary program administrators that managed programs with local government courses were contacted in order to reach as broad an audience as possible. With their permission and cooperation, each organization agreed to send out the survey request. An invitation script to the survey, the CivicInfo BC survey link, and the survey implied consent form were all included in the body of an email. This email was supplied to LGMA and the six program administrators and they forwarded the email to LGMA members and respective students. LGMA sent out the request to their 833 members, and 614 students were contacted (57 students from Camosun College, 250 students from Capilano University, 12 students from College of the Rockies, 29 students from NorthWest Community College, 112 students from University of Northern BC, and 154 students from University of Victoria). There were 214 respondents for a response rate of 14%. Comparing the timing of when the respective survey requests were sent out to the login times on the survey, it appears that LGMA members are the predominant group in the survey results. The survey did not differentiate whether a respondent was a local government employee, an LGMA member, and/or a current student of local government.

Report Limitations

There were time constraints on this project due to how it was initiated. The researcher was working on another 598 topic from January 2011, with CivicInfo BC as the client. It dealt with creating an equivalency tool for BOE certificate applicants, in an attempt to address the course equivalency issues identified through the creation of the “Guide to Local Government Education and Credentials” and through applicant feedback. The tool’s purpose was to provide validation for arguments that a particular course was equivalent to a required course as written in the BOE *Regulation* and policies.

As part of the report process the Ministry of Community, Sport, and Cultural Development, Local Government Department was approached to get their support, as they were a stakeholder in the equivalency tool. The BOE administrator and Chair were enthusiastic about the idea, and after further negotiations the BOE became the client. The scope of the 598 changed dramatically, to a desire to review the BOE program. The equivalency tool, while initially a part of the report as a short-term deliverable, was dropped from the report. The new 598 began on March 8, 2011 and a deadline was already in place to have the report completed by August. The administrator is approaching retirement and wanted to have a finished report with recommendations for the BOE program ready for her successor.

Literature Review Limitations

Regarding the literature review, there is a large body of literature on competency, competence, and core competencies in the social science fields, with differences between countries and continents, and with different modes of practice and use. The literature search had to be centered on what would be applicable to the report and therefore focused mainly on North American publications and reports about theories and practice of competency.

Focus Group Limitations

The time constraint limited aspects of the report, namely an extended consultation session. Focus group sessions and questions were created in light of what the BOE anticipated it wanted, but did not initially reflect the literature review conclusion (which had not been written yet). There were minor revisions to the focus group questions, centered on the working definition of ‘competency’. There would only be time for one round of focus groups, and while individual participants could be contacted afterwards, a second round of focus group sessions was not advisable. Focus groups were limited to managers because one researcher in a short timeframe does not have the resources for extended focus groups with general local government employees.

A focus group for the Local Government Educators Working Group was planned in the early stages of the report and was part of the proposal, ultimately though the group was dropped. It was dropped because the initial goal of this focus group was to find out what competencies were already being provided in B.C. post-secondary institutions. However, this is the wrong approach to making a competency model. Furthermore, the way the report research was heading, in terms of competency perhaps being not the right direction for BOE certificates, this focus group proved unnecessary.

The focus group was planned for the 2011 LGMA Annual Conference on May 17th in Penticton, but was cancelled. However, in the spirit of keeping all BOE stakeholders in the communication loop, an update was provided by Gary Paget, Chair of the Board of Examiners, to inform the Educators Working Group about the upcoming review of the BOE program and the foreseen changes based on client feedback. When and if changes are made to the BOE program, the B.C. post-secondary institutions should be consulted to get their feedback over the changes and to match or create new courses linking to the *Regulation* defined core knowledge and skills.

Survey Limitations

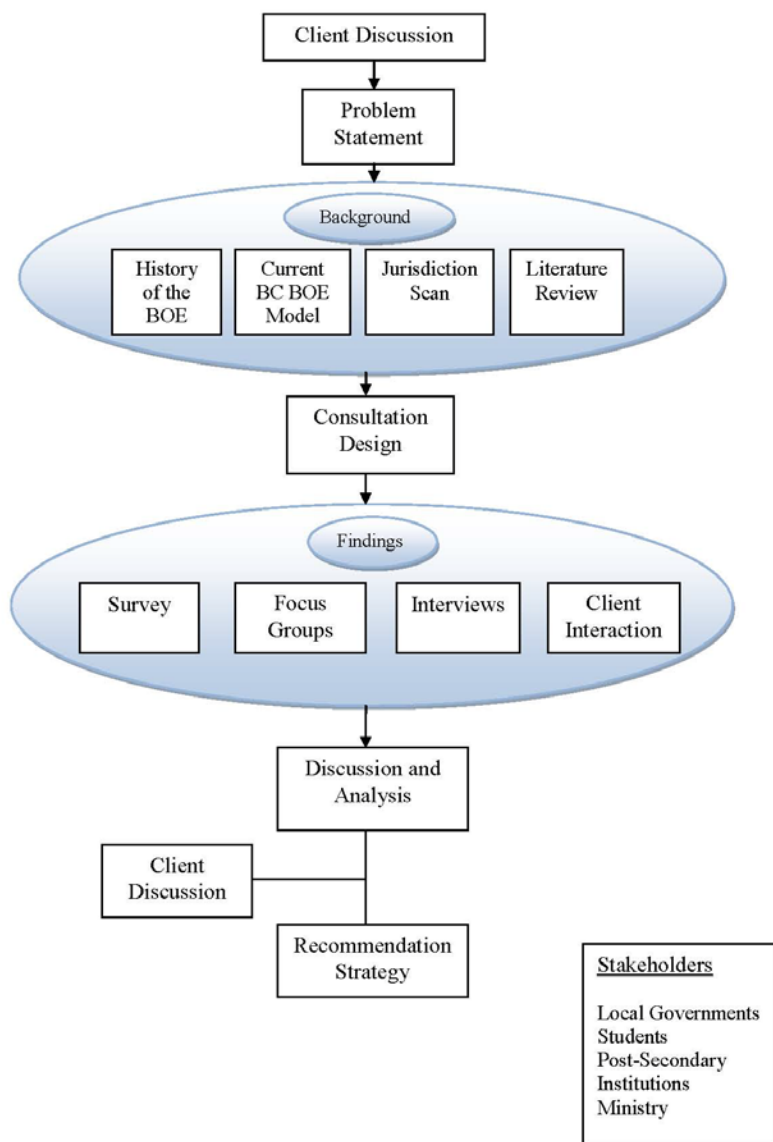
The survey was limited to the current BOE certificates because the client and the BOE wanted to gauge the current reaction and attitude towards the existing program, seeking justification to change the *Regulation* to address the client concerns. Questions on or about competency were not appropriate for a general employee survey when the level of knowledge regarding competency is unknown and there was no time to schedule, draft, and present an education campaign on the subject to general employees in local government.

The survey was hosted by CivicInfo BC because of their reputation and reliability in hosting B.C. government surveys. The other option was SurveyMonkey, and while they are also an established host with excellent survey options, they keep the content of the surveys on their American server. Under the US *Patriot Act* the US government is able to access all user information without participants’ consent. This was an unnecessary burden and with the option of CivicInfo available, SurveyMonkey was dropped.

Framework for the Project

The framework in Figure 1 provides an idea of how the project flowed from the initial client discussion. While the framework is not exact, as parts of the project were designed, researched, and worked on simultaneously, the framework does provide a visual image of how the parts of the report connect to each other.

Figure 1 - Project Framework



LITERATURE REVIEW

The literature review focuses on competency for two reasons. The prevalence and popularity of competencies in the public and private sectors provided the drive to pursue research into a competency model option for the BOE program. Secondly, a list of competencies in a BOE framework rather than set courses was perceived as an option to address the challenges of course equivalency and course availability in the current BOE certificates.

The term competency has been in use for several decades, since David McClelland made the concept popular from 1973. Although he did not define competency until later, McClelland began the push to use competencies in an organizational context to improve job performance. The use of competencies in organizations became the typical North American approach for both private and public sectors.

It is also acknowledged that the use of the term competency soon brought confusion between the ideas of competence and competency. The confusion over competency has several avenues, such as the aforementioned difference between competency and competence, the UK and European focus on competence in jobs and education rather than individuals, and with the proliferation of definitions for competency. Therefore in the interest of this report, the focus is on the North American use of competencies in a model to improve job performance. This focus was chosen because of the prevalence of such competency models in North America, both in the public and private sector, and because the Board of Examiners certificates focus on the individual.

The review looks at the theories of competence, offers a sampling of the variety of definitions for competency, examines the differing views on competency between the UK and North America, and gives a brief history of the American competency movement through major contributors. Furthermore, the review summarizes the creation process of a competency model according to North American standards, offers criticisms of competency models, summarizes the latest research in competency modelling best practices, and provides reasons, based on this literature review, why a competency model is not the best option for Board of Examiners certificates.

Competency and Competence

Before exploring the topic of competency modeling, the background of competency and competence should be explored to demonstrate the depth and breadth of the topic. In general terms, 'competency' ('competencies') refers to characteristics of an individual that are associated with job performance, and 'competence' refers to what a person needs to know and be able to do in order to undertake the tasks of a job (Winterton, 2009). Or even simpler, 'competencies' are the characteristics needed to perform a given task, and 'competence' is the ability and willingness to perform that task (Burgoyne, 1993). There is considerable ongoing debate regarding the two terms and proper definitions (Winterton, 2009).

Theories of Competence

Frank Weinert (1999) compiled a report for DeSeCo (Definition and Selection of Competencies) and the Organisation for Economic Co-operation and Development (OECD) concerning the theoretical background(s) of competence. Weinert compiled a list of nine different theories of competence in that are grounded in the social sciences:

Table 2 - Nine Theories of Competence Grounded in the Social Sciences

| Theory | Description |
|--|--|
| General cognitive ability | This focuses on general competencies, and it is the psychometric approach. |
| Specialized cognitive skills | These are categories and characters of specialized, rather than general, competencies. They are clusters of competencies; requires long-term learning, broad experience, deep understanding of the topic, and automatic routines consciously controlled. |
| Competence-performance model | This is Noam Chomsky's theory of linguistic competence and performance. It is an inborn system of principles, rule based learning, with performance that depends on learning and experience. |
| Modified competence-performance model | This implies that the relationship between competence and performance is influenced by other factors. Competence falls into 3 domains: <ol style="list-style-type: none"> i. conceptual competence, which is the Chomsky theory; ii. procedural competence, which is the availability of procedures and skills necessary to apply conceptual competence in actual situations; and, iii. performance competencies, which is using the available skills to evaluate and solve a problem |
| Motivated action tendencies | This is the notion of 'self-concept', the knowledge and belief of your own learning and performance. It implies competence as objective performance criteria and subjective personal conclusions on learning and performance. |
| Objective and subjective self-concepts | This is taking the previous theory further. There are three components to subjective competence: heuristic, epistemological, and actualized. |
| Action competence | This theory goes beyond concepts to include the actual. It is more concentrated on the individual and the conditions of success for meeting a specific task in specific contexts (job, organization, and social groups). This is the predominant American theory of behavioural competencies, starting with McClelland and his successors, and the main focus for this literature review. It will be examined in more detail later. |

| | |
|------------------|---|
| Key competencies | This refers to competencies that can be applicable in any situation. It goes beyond a specific role, job, organization, or social group. This theory advocates for general competencies, although the problem is “it has been demonstrated that general competencies have virtually no practical utility alone. Rather, specific knowledge, embedded in experience, is required to successfully implement available competences for solving practical problems.” (p.12) |
| Metacompetencies | This theory concerns “learning about learning”. It implies having knowledge about your own competencies, as knower, learner, and actor. Reflective learning is an example of a metacompetency (McDavid & Hawthorn, 2006). |

Definitions of Competency

There have been a multitude of definitions and theories over the past four decades. It would be a challenge to create a singular definition that would satisfy all the different contexts, purposes, researchers, and fields of study. Table 3 shows the complexity and variety of definitions regarding competency.

Table 3 - Definitions of Competencies

| Author | Definition |
|--------------------------|--|
| Boyatzis (1982) | Competencies are underlying characteristics of an individual which are causally related to effective job performance |
| Burgoyne (1993) | ‘Competencies’ are the behaviours needed to perform a given task, and ‘competence’ is the ability and willingness to perform that task |
| Woodruffe (1992) | Defines competency as “a set of behaviour patterns that the incumbent needs to bring to a position in order to perform its tasks and functions with competence” (p.17) |
| Spencer & Spencer (1993) | “A competency is an underlying characteristic of an individual that is causally related to criterion-referenced effective and/or superior performance in a job or situation” (p.9) |
| Parry (1996) | Derives his definition of competency from a 1995 international conference on competencies, “A competency is a cluster of related knowledge, skills and attitudes (KSAs) that affects a major part of one's job (a role or responsibilities), that correlates with performance on the job, that can be measured against well-accepted standards, and that can be improved via training and development.” (p.50) |
| Mirabile (1997) | Competency is “a knowledge, skill, ability or characteristic associated with high performance on the job. Some definitions of a competency include motives, beliefs, and values.” (p.75) |
| Shippmann et al (2000) | His team acknowledged the diverse definitions and came to this conclusion, “In all the above contexts-legal, clinical psychology, vocational, educational, and industrial psychology-the term |

| | |
|------------------------|--|
| | 'competence' defines 'successful' performance of a certain task or activity, or 'adequate' knowledge of a certain domain of knowledge or skill." (p.707) |
| Rodriguez et al (2002) | The United States Office of Personnel Management (OPM) defines competency as "a measurable pattern of knowledge, skill, abilities, behaviours, and other characteristics that an individual needs to perform work roles or occupational functions successfully." (p.310) |
| DeSeCo (2003) | "A competence is defined as the ability to successfully meet complex demands in a particular context. Competent performance or effective action implies the mobilization of knowledge, cognitive and practical skills, as well as social and behaviour components such as attitudes, emotions, and values and motivations." (p.2) |
| Marrelli et al (2005) | "A competency is a measurable human capability that is required for effective performance." (p.534) |
| Campion et al (2011) | "Competency models refer to collections of knowledge, skills, abilities, and other characteristics (KSAOs) that are needed for effective performance in the jobs in question. The individual KSAOs or combinations of KSAOs are the competencies and the set of competencies are typically referred to as the competency model." (p.226) |

Every definition has some aspect of knowledge, skill and 'other' characteristic (some cognitive or otherwise conceptual trait or disposition). Most of these definitions connect the traits with the performance on the job or in a task area. There are three main positions in relation to a competency definition. Some competency theorists have used more than one of these positions in their definition:

1. Observable performance
2. The standard or quality of the outcome of the person's performance
3. The underlying attributes of a person (Hoffman, 1999).

Chan (2006) updated Hoffman's breakdown of the definitions. She summarized that competencies have some or all of the following characteristics:

- are a cluster knowledge, skills, abilities, motivation, beliefs, values and interests;
- relate to a major part of the job;
- are associated with average and/or superior performance;
- are observable and measurable against accepted standards;
- can be linked to future goals of the organization; and
- can be improved through training and development

In the end, it is important to remember that a definition of competency is inseparable from the context in which it is developed. The situational aspect is important in building any kind of competency model (DeSeCo, 2001).

Competencies and Competence in the US and the UK

The UK Approach

This is called the educational approach or the functional approach (Le Deist & Winterton, 2005; Markus, 2005). It concerns the development of skills, achievement of standards, and awarding of credentials. In the UK, industry that relied on trades and technical skills developed standards of job competence based on expected work outcomes. It became tied to Vocational Educational Training (VET) so a unified system of work-based qualifications could emerge. A 'competence' was defined as "an action, behaviour or outcome to be demonstrated, or a minimum standard". This framework created the National Vocational Qualifications (NVQs). There have been numerous criticisms of this framework (Le Deist & Winterton, 2005).

The US Approach

This is called the psychological approach or the behavioural approach (Le Deist & Winterton, 2005; Markus, 2005). This is essentially McClelland's and Boyatzis' work on personal competencies, motives and personality traits. The most important point of this approach is that factors or inputs (i.e. behaviours) associated with individual success could be identified, and then taught to others.

Differences between UK and US Approaches¹

A major difference between American and UK theory and practice is the distinction between 'competency' and 'competence'. UK 'competence' can be defined as aspects of the job which an individual can perform, while American 'competency' refers to an individual's behaviours underpinning competent performance. The American practice is an input based approach, defining the inputs required for the underpinning competent performance. The UK practice is to use competence as a measure of outputs (Brophy, 2002).

History of North American Competency Movement

The UK approach demonstrates the other possibilities and uses of competence and competency. However, the focus for this report is the US behavioural approach because of its dominance in the North American private and public sectors. Therefore it is beneficial to look at the history of how the US approach developed.

¹ *France and Germany Approach*

In Europe there are two other prominent approaches to competence. The French approach is more comprehensive than the US approach, with three key components in *savoir, savoir-faire, and savoir-etre* (knowledge, functional competences and experience, and behavioural competences). In France individuals have the right to get their competences independently assessed for personal development in their work. Competence is now a strong component in HRM in France (Le Deist & Winterton, 2005).

Kompetenz in Germany was always in their VET system, although the main emphasis is on the necessary learning inputs instead of outcomes. *Kompetenz* refers to the capacity of a person to act and it has a more holistic meaning. In 1996, German education changed to an action competence approach moving from inputs to outcomes (from knowledge and skills to learning fields). VET curriculums all have an explanation of the range of competences, from vocational action competence, personal competence, and social competence. These are combined into a balanced educational learning approach (Le Deist & Winterton, 2005).

Robert White is occasionally referred to as the first person to use the term competence in 1959. His definition was in a sciences context, where “competence will refer to an organism's capacity to interact effectively with its environment.” (White, p.297) He argued that competence refers to personal characteristics associated with superior performance and motivation.

David McClelland is the Harvard academic often credited as the first person to use the term 'competency' in its modern context. In his 1973 article “Testing for Competence Rather Than for ‘Intelligence’” he promotes the idea of using competencies to measure intelligence rather than the standard IQ tests. He argued there were multiple forms of intelligence and the IQ test did not measure anything significant besides doing well on the test. His solution was criterion sampling, where actual performance is measured to determine levels of success. Academic performance and tests of knowledge were not enough to predict above average job performance or success in life. Rather, individual characteristics or competencies could identify above average performers.

Richard Boyatzis, a student of McClelland, took the idea of measuring competencies a step further with his 1982 book “The Competent Manager”. He defined competencies as the underlying characteristics of a person that is related to superior performance. In his book he interviewed, rather than observed, over 2000 managers who held a variety of positions in a dozen companies and analyzed the results to produce a list of competencies that together highlighted a ‘competent manager’. Notable in his book is the first empirically based and fully researched examination of competency models and their development. Boyatzis' book was the first detailed work on competencies and brought attention to competencies being used as the underlying characteristic of a person that leads to improved or superior job performance. He stated it was important to clearly define competencies through clearly defining performance outcomes and linking the outcomes to behaviours that cause those outcomes. He used the behavioural event interview technique with his sample of over 2000 managers to accumulate behaviours that led to superior performance (Rothwell, 1999).

C.K. Prahalad and Gary Hamel contributed to North American competency theory with their 1990 Harvard Business Review article on a concept they called 'core competencies'. The theme was still regarding competencies and performance, although the focus was changed from individual competencies to competencies that apply to the organization as a whole. Core competencies refer to the collective learning in an organization. The use of 'competency' is misleading because while it contains the elements of knowledge, skills, abilities and other characteristics, it is less about the human resource connection than it is about the organization's competitive strategy (Rothwell, 1999). Nonetheless, the popularity of the article made the idea of both individual and ‘core’ competencies highly influential in America. The popularity of the article can be gauged by the fact that it is the most re-printed article in the Harvard Business Review's history (Shippmann et al, 2000, p.712). The bridge to competency modeling comes with the article's emphasis on ‘people-embodied skills’. Therefore if organizations want to achieve a core competency

in a product or service, they should focus on competency modeling to promote the necessary individual competencies in their employees (Shippmann et al, 2000).

Lyle Spencer and Signe Spencer were also students of McClelland, and they worked together on competency research. Spencer and Spencer published their book, "Competency at Work" in 1993. In their book they provide the theoretical background to building a competency model. Their book is written for ease of use to allow organizations the creation of their own model. The book is part vindication of competency modeling, providing reasons why a model is a good idea for an organization, and part guidebook, detailing the reader how to proceed with making a model from scratch.

Anntoinette Lucia and Richard Lepsinger wrote their how-to book on competency models in 1999, "The Art and Science of Competency Models". It provides a straight-forward, non-academic, approach to creating a competency model. The authors are human resource management (HRM) consultants and the book is written in a practical fashion to easily implement a competency model. The underlying framework to the model is based on McClelland's and Boyatzis behavioural theories. The book also offers justification for the use of competency models in HRM.

The Appeal of Competencies

The demand for improved job performance, combined with the extensive use of the term 'competency', has brought competency modeling into common, everyday use. The focus of competencies is on broad applicability within an organization and highlighting the individual competencies that are common or universal for an occupational group, level of job, profession, or an organization as a whole. Competency models are more likely to emphasize a long term organizational fit because of the strong ties to organizational goals. Competency modeling is likely to include multiple review sessions and focus groups during the creation process to make sure the right language and descriptions are used. This increases the validity of the model. Competency models are more likely to foster the development of training options.

However, competency models are still weak in recruitment, performance appraisal and other HR decision making applications compared to typical job analysis, likely because the current level of rigor and documentation during the model creation would have difficulty passing a legal challenge. Yet while job analysis is concerned with the work, competency modeling is concerned with the worker. Furthermore, typical job analysis looks at what is accomplished, while competency modeling looks at how the work is accomplished. For organizations eager to carve a niche in the global economy, competency modeling can offer an advantage, as long as the model is a living document that is constantly reviewed and adapts to changes in organizational goals (Shippmann et al, 2000).

Competency Models

When competencies are identified for an organization, they are often arranged into a competency model. Models usually include clusters of related competencies. Just as with the definition of competency, there are multiple methods of designing and implementing

a competency model. The competency model can often distinguish between average and superior performance. However, the end product usually serves the same purpose, to identify and describe which competencies are required to perform a role or job successfully.

A competency model is an organizing framework that lists the competencies required for roles or jobs. A difference between models is the intended “audience”, for whom or for what are the competencies intended. The users of the model can range from very specific, such as for one particular job or very broad such as for a profession, a department, or a job category.

The size of the organization should be a factor in determining the model. Larger organizations should use survey approaches to collect job information to get sufficient input from a representation of the relevant population. Smaller organizations or smaller job roles within larger organizations should use focus groups (Rodriguez, 2002).

How much detail to include?

The fundamental question is what is trying to be accomplished with the model. More detail means it takes more time, more money, the results cannot be generalized, information cannot be compared across jobs or people, there are more restrictions on the range of acceptable performance, there are more restrictions on creative ways to achieve the same results or level of performance and the information will become obsolete faster. However, with more detail performance management can become more specific, and the model will show the difference between performance levels among people more clearly.

Generally, as the focus of the model broadens, the competencies become more generic. This is a necessity in order to make sure the competencies cover every aspect of a general role. However, the more generic the competency, the more inconsequential it becomes to specific jobs and roles within the model. Conversely, the narrower the focus, the more precise the competencies become. A narrow focus and more detail is the ideal, in order to discover the exact competencies required for a specific job. However, while this is the preferred level of focus, there are the aforementioned drawbacks. It is usually not cost-beneficial to organizations to undertake this level of effort for every job (Mirabile, 1997).

Creation of a model

There are three main methods of creating a competency model: borrowing or purchasing, modifying an existing model, or creating a model from scratch (Lucia & Lepsinger, 1999; Rothwell, 1999).

- **Borrowing/Purchasing:** Getting an existing model from a consultant or another organization is the least valid of the methods because the model is not geared towards a particular organization. However, it is beneficial because it is easy, quick and cheap.

- **Modifying:** There is increased validity because the model is adapted to the organization, and it has more value for specific positions and human resource systems. However, it is not as easy or quick as borrowing.
- **From scratch:** This is the most common method mentioned in the literature. It is the most valid approach because the model is made for a specific organization and their needs. More general competencies are usually weaker in terms of their connection to an organization's human resource systems. However, it is also the most costly method, the most time-consuming, and takes the most resources. It has the most value because it should be directly tied to the human resources system and therefore linked to training, promotions, rewards, and other HR components. It is also the most legally defensible should arguments against it be brought to court, for calls of discrimination, for example (Lucia & Lepsinger, 1999).

The method chosen depends on an organization's capacity and their reasons for using a competency model. Time, budget, reasons for use, and their ability to use in-house staff with experience using competency models, are all factors in choosing one method over another. Regardless of why a model is chosen, the model should use competencies that reflect the organization's business needs and empower staff to perform their jobs effectively.

Steps in the creation of a competency model

There are four steps in the creation of an organizationally valid competency model from scratch. The four steps are:

1. Define the objectives
2. Plan the methodology and collect data
3. Analyze data, identify the competencies and create a competency model
4. Apply, evaluate and update the model

Each step involves rigorous research and consultation with stakeholders. Therefore the process is time consuming and data intensive, yet this is necessary for a valid model. Defining the objectives sets the foundation of understanding why the process is being done, the scope of the model, and how the model will be applied. Data collection discovers the relevant competencies for the model, and there are several methods to collect the data. Using two methods is recommended to cross-check, corroborate, and validate the results. Analyzing the data and creating the model involves clustering the competencies into 10-12 similar groups that are critical to job performance, writing clear definitions of the competencies, and providing examples of behaviours for the competencies. The final step is to apply the model, evaluate the results and modify the model if and when necessary to maintain the connection between competencies and organizational goals. For more detailed information on how to create a competency model, please see Appendix E.

Use of Competency Models

Rodriguez (2002) believes there are two primary reasons to use a competency model. The first reason to use competency models is for HR performance management purposes in specific occupations. This is at the individual performer level. The second reason is to organize occupational groups to maximize the use of organizational resources. Models are typically developed for individual occupations. The model provides the basis for HR functions. It is used for recruitment and selection because the model can be used to get a “whole person” picture of an applicant, rather than just the minimal qualifications. Models can be used to form the foundation of training activities and courses, either by comparing the job competencies to currently offered courses by educational institutions to find matches, or by creating courses around the competencies. The model can also be used for succession planning by measuring the competencies of current managers and staff, finding gaps, assessing their future needs and training them to fill the competency gaps. Using the model to organize occupational groups can streamline HR activities. A competency model can be used to link the organizational goals to competencies desired in staff. The organization can reward actions and performance that directly related to the mission and values.

Competency models address exactly what is required for an organization to succeed. They clarify people’s shared beliefs about what is required for a job and present it in an unbiased format. The final product may mirror a person’s “gut” feeling about job requirements, although a competency model goes further and relates that “gut” feeling to performance criteria and/or business needs. Also, competency models tend to look to the future of an organization and what is required, not just the present job requirements (Lucia & Lepsinger, 1999).

Criticisms of Competency Based Approaches

There are a few notable criticisms against the use of competencies. Mirabile (1997) says that competency models are useless if there is no coherent implementation. It is necessary to have the right content, process and structure to have a chance of success. It also requires someone on an administrative level to manage the model closely, with the most appropriate administrator working in the HR department.

Rothwell (1999) outlines three main challenges to competency modeling. As seen in the definitions section, there is no common language for competence or competency and its derivatives. There should be an attempt to make a common language to eliminate ambiguous terms. The second challenge is that most competency models look to the past, focusing on what has been done and how well, as compared to looking to the future and what needs to be done. This occurs even though the advocates of competency modelling clearly say the competencies should look to the future. The third challenge is the balance between rigour and resources, namely time and cost.

One of the more vocal critics of competencies and competency models is Markus et al (2005). As observed in the previous sections, many writers acknowledge the importance of validity in a competency model. Markus et al goes deeper into the issue with their

criticism of competency validity. They break their arguments into three sections, although they all deal with the theme of validity.

Construct Validity

Markus et al's first argument deals with the validity of the *concept* of competency. They ask, 'What is a competency?' There is no real world reference, so conceptual definitions need to be framed. Often there are disagreements between staff, managers, consultants when constructing working definitions of competencies, usually in the description of observable behaviours that are associated with a competency. This difficulty and disagreement in establishing clear definitions is at direct odds with the goal of using competencies to communicate, promote and reward organizational goals.²

There are issues with the kind of model structure used. Competencies can be either broad or specific, with generic competencies being applicable to multiple roles. The danger lies with generic competencies being too broad and individual users unable to see the relevance to their jobs. Simple models are the recommendation, although complex models can provide more accurate information. However, complex models are a burden for administration purposes, as well as potentially being too complicated for the average user. In practice, the generic model is usually used by organizations. However, the more universal the model, the less relevance there is to the individual and their jobs.

Competency Model Validation

Markus et al's second argument concerns the validation of the competency model. Their argument mirrors the caution that advocates of competency modelling urge to practitioners regarding the implementation of the model. There cannot be implementation without validity that the model truly promotes and develops the desired behaviours that will meet organizational goals, as explained by Shippmann et al and other model-creation writers such as Spencer & Spencer and Lucia & Lepsinger. If the model is used only for training and development then it is sufficient to only have face value and it doesn't require an in-depth validity test. Face validity is enough to understand the skills,

² This is broken down further into two parts, content and face validity, and criterion validity. In content and face validity, Markus et al asks, 'Are competencies credible in organizations?' A lack of collective agreement with the term 'competency', both within the academic community as well as with consultants, is a problem. With content validity the descriptions of competencies need to be representative samples. With face validity the competencies need to be accurate and appropriate, as seen by the users of the model. Even when using consultants, SMEs or broad and multiple data collection methods, there could be content and face validity issues. It may be impossible to break down a competency into a complete list of elements. There is always the challenge that something is missing. If a list of competencies and their components are potentially incomplete, their validity is challenged.

Criterion validity questions if competencies are accurately measured. If competencies are described in broad terms, then the measurements are equally broad. Evaluations are often done by the individual or by a supervisor. Therefore, competency-based performance suffers the same problems as other performance appraisal techniques, such as the bias of the evaluator. If a major benefit of the competency model is linking it to HR systems and the performance measurement aspect is flawed, this has negative connotations for the model.

knowledge, abilities and other characteristics necessary to be successful at the job (Lucia & Lepsinger, 1999).

Predictive Validity

Markus et al's third argument concerns predictive validity. That is, do competencies actually predict or direct improved individual job performance and/or improved organizational performance? There is a lack of evidence on the promised benefits of competency models. There has been no in-depth academic or empirical study on the results on job performance after a competency model has been established and used in an organization. Furthermore, there is confusion between competency and job performance. Behaviours, knowledge and skills are inputs to the job, and objective job performance is the outcome. However, competencies are assessed by 'performance' of behaviours which are criteria for the competencies. The confusion of terminology has created a circular flow that artificially validates the competencies. "Competencies are identified, behavioural criteria are defined, and then in the absence of objective measures of job performance the subjective evaluation of the occurrence of these behaviours is assumed to equate to (job) performance and validate the competency construct itself." (Markus et al, 2005, p. 121) The competency approach assumes that the flow is from the individual to the organization, so that a higher level of individual competency leads to improved effectiveness. However, the reverse is also possible, with an effective organization increasing an individual's competency.

Finally, even one of the pioneers in competency theory acknowledges the challenges with competencies. According to Boyatzis (2008), almost every organization with 300 or more employees uses some form of competency based human resource system. However, academic research has not kept pace with the popularity of competency, resulting in scepticism from the academic community. Furthermore, consultants are eager to create competency models, yet they are hesitant to validate their models with rigor and publish the results of their validation.

Best Practices from the Latest Research

Campion and his team are the most recent group of researchers to approach competencies and competency modelling. Their 2011 report compiles a list of 20 best practices for consultants, human resource departments and other researchers to follow. Please see Appendix F for the full list. The best practices most relevant in consideration of a Board of Examiners competency model are:

1. First, consider the organizational context, with KSAOs linking to organizational objectives and strategies.
2. Competencies need to be rigorously researched and developed. Staff trained in research methods should find the competencies using multiple methods to confirm and validate data.
3. Competencies should consider future-oriented job requirements and models should be regularly updated to match evolving organizational goals.
4. There should be widespread involvement of organizational employees at all stages to help with the acceptance, use and validity of the model.

5. Use competencies to develop human resources systems. This is main reason for creating a competency model. The connection between the model and organizational goals also links HR systems to organizational goals.
6. Use competencies to align the human resources systems. Hiring, training, promotion, career development, and pay are linked to KSAOs, which are linked to job performance and organizational goals, therefore HR can reinforce the same competencies by structuring employee performance management and evaluations around competencies.
7. Finally, competency models should be developed using scientifically rigorous methods and validated at every stage of its development, including the implementation and evaluation stages.

Conclusion

Overall, it is important to keep in mind that the creation of a competency model is time and resource intensive and should not be undertaken lightly. Based on the literature and the latest best practices, a workable competency model would require these essential points. First, a competency model must consider the organizational context and link to evolving organizational goals. Next, competencies must be rigorously researched by trained staff using several methods, include employee involvement, and be validated at every stage of development. Third, competencies must link to human resource systems, completing the triangle between competencies, organizational goals and human resource management. Finally, the competency model must be regularly evaluated and updated for the competencies to match organizational goals and be relevant to human resource performance management and other HR functions.

After investigating the literature, it has become apparent that using competencies and creating a competency framework is not appropriate for the Board of Examiners certificates for the following reasons:

- 1) There is no legal connection between the Board of Examiners and local government human resource systems, therefore there is minimal validity and value in creating a framework
- 2) The BOE certificates are voluntary, and therefore a competency framework could not be used as a standard for local government training, performance evaluation, promotion, and other human resource functions
- 3) The BOE certificates recognize educational achievements and work experience. They do not look at behaviours or outcomes of those skills and knowledge, which are necessary components for a workable competency framework. Although this can be researched, it would be a major undertaking for the BOE, a body with limited resources. To go beyond skill and knowledge the BOE would need to undertake an extensive data collection effort in order to make the framework valid across all the local governments in BC
- 4) It is more appropriate for a local government association or an individual local government to create a competency framework, with the BOE certificates as one component, essentially as the underpinning skills
- 5) At best, any notion of competencies would be symbolic and possibly misleading.

JURISDICTIONAL SCAN

The jurisdictional scan examines local government employee certification programs from across Canada and a selection of other countries in order to discover common and unique practices, requirements and structure. All of the Canadian provinces and territories are explored because it is standard practice for the B.C. government to investigate their fellow provinces for good policy and good ideas. A selection of other countries, chosen for their democratic practices, prominent and material rich websites, or reputation, is looked at for the same reasons, good policy and good ideas.

Canada

Alberta

The *Alberta Municipal Act* does not have a requirement for education or certification of local government administrators. Alberta has the Society of Local Government Managers (SLGM) which is registered under the *Alberta Professional and Occupational Associations Registration Act*. The SLGM is empowered through the Alberta statute to regulate standards of practice for their members. They have their own designation process for Alberta managers who have the educational prerequisites, and they are empowered to do so under the Act. The SLGM has its own Definition of Practice, written in 2002, for managers which include “core knowledge and core skills”. These are the expected skills and knowledge learned through the University of Alberta courses and work experience.

The SLGM designation of Certified Local Government Managers (CLGM) is given to managers who hold certificates from the University of Alberta Local Government Program and the National Advanced Certificate in Local Authority Administration (NACLAA) Level II (or the equivalent as approved by the Examination Board in Local Government Management). There are a few other requirements, namely 5 years experience as a local government manager in Canada, membership in the Society and adherence to the Society’s Code of Ethics. The U of A program does not count as formal academic credit, although there is accreditation and the courses/program are transferable between select institutions (U of A, University of Regina, University of Manitoba, Athabasca University, and the School of Community Government in NWT).

The NACLAA is a popular distance learning program from U of A and Dalhousie University that has merit for comparing the B.C. Board of Examiners requirements. The NACLAA Program consists of two levels of certification. The first level has five compulsory and three elective courses. NACLAA Level I Compulsory Courses are:

- Public Administration Professionalism
- Local Government
- Local Government Finance
- Municipal Law I
- Organizational Behaviour and Leadership

Elective Courses:

- Financial Management
- Human Resource Management
- Local Government Accounting
- Property Taxation and Assessment
- Sustainable Communities

The NACLAA Level II certificate consists of four compulsory courses:

- Citizen Engagement and Consultation
- Municipal Law II
- Organizational Design and Management
- Policy Planning and Program Evaluation

Saskatchewan

According to the Saskatchewan *Municipalities Act*, section 110(2), an administrator (as appointed by Council) must be qualified as written under *The Rural Municipal Administrators Act* or *The Urban Municipal Administrators Act*. These latter Acts empower the Rural Municipal Administrators Association of Saskatchewan (RMAA) and the Urban Municipal Administrators Association of Saskatchewan (UMAAS) to provide courses and certificates for administrators. This was changed in 2005 when the previous *Rural Municipality Act* and *Urban Municipality Act* had a Board of Examiners referenced directly in the legislation. Now the Board is made separate from government, in section 11(5) of *The Rural Municipal Administrators Act* and section 16(6) of *The Urban Municipal Administrators Act*, and administered through the associations.

The RMAA and UMAAS certificates use different language, but have essentially the same requirements for their certificates. Their education requirements are a certificate in local government from the University of Regina (U of R), or any other equivalent business or public administration degree as well as at least one year of work experience for the basic certificate. They have a Class A / Advanced I certificate, which requires two additional years of work experience and professional development courses offered through their associations or U of R. The Superior Class A / Advanced II certificate requires an additional five years of work experience, plus additional professional development courses.

The Certificate in Local Government Authority from the University of Regina is a distance program with four required courses. The courses are: Introduction to Local Government Authority, Local Government Legislation and Statute Law, Basic Accounting Practices, and Local Government Accounting.

Manitoba

The Manitoba Municipal Administrators Association has the power through the *Manitoba Municipal Administrators Association Inc. Act* to create a certificate program. The program is run through the University of Manitoba Continuing Education Department and is called the Certificate in Manitoba Municipal Administration (CMMA). It is an online program that takes at least three years to complete, and students can take up to five

years to complete it. It consists of five compulsory courses and one elective (chosen from a list of two courses from the NACLAA courses at the University of Alberta).

The required courses are: Managing the Human Resources Function, Municipal Accounting, Municipal Administration, Municipal Law, and Introductory Accounting for Municipal Managers. The two elective courses from the NACLAA program are: Local Government, and Public Administration Professionalism.

Ontario

In Ontario there are two organizations with certification authority, the Association of Municipal Managers, Clerks and Treasurers of Ontario (AMCTO) and the Ontario Municipal Managers Institute (OMMI).

OMMI is legislated through a Private Members Bill (Pr27, 1988) to provide their certification, called the Certified Municipal Manager (CMM), to any who apply and meet the requirements. Certification is not mandatory and is applicable to all municipal managers. The OMMI website has ties to other Ontario civic service websites such as fire, police, and emergency managers. The OMMI certificate does not have prescribed courses, instead it recognizes current education and training using a point system, then provides certification to successful applicants.

AMCTO does not have legislative authority, but they do have a comprehensive certification program and their profile is much higher than OMMI. They have the Certified Municipal Officer (CMO) program and certificate. The CMO program administers their courses and has a rigorous curriculum. Their program looks much cleaner, involved and rigorous than OMMI.

The CMO certificate courses are called the Municipal Administration Program (MAP). It consists of four core courses: Introduction to Local Government, Municipal Administrative Structure, Municipal Financial Management, and Management in the Municipality.

AMCTO also offers two diploma programs, a Diploma in Municipal Administration (DMA) and an Executive Diploma in Municipal Management, which have more course requirements and is run through the Association. The DMA includes the MAP, two courses in finance, four courses in law, and four workshops in employee law and human resources. The Executive Diploma consists of 20 workshops in a variety of topics, all run through the AMCTO and their partner institutions.

Quebec

The Corporation of Municipal Officers of Quebec (COMAQ) is a professional association granted through Quebec statute. The association can grant the title of Authorized Municipal Officer (OMA) to their members. This certificate includes work and educational requirements. An applicant must be a member of COMAQ, must have 90 credit hours from a recognized university, and must take 42 hours of training from workshops and courses hosted by COMAQ. Applicants must also have a minimum of 3

years experience in local government, presumably in Quebec although that is not explicitly mentioned on their website.

In collaboration with the University of Montreal, there is also a non-credit certificate available called the Certificate in Municipal Performance Management for senior managers. The certificate has three courses, two are mandatory and one is an elective. The focus of the courses is on management and leadership. There is a second level of certification consisting of an additional three courses which specialize in areas of leadership and management theory.

A second municipal association in Quebec is the Municipal Directors Association of Quebec. It appears they are in the process of creating a certificate for their members. Their website explains the actions taken so far and the list of things to do. They have a list of competencies that their certificate program aims to meet.

Certificates appear to be for the General Director (CAO) and Secretary-Treasurer positions. There will be three progressive levels of certificates based on the acquisition of competencies. There are 12 competencies listed on their website. The competencies are clustered around understanding administrative roles and local government in general, management (performance, project and leadership), human resources, finance, and communication. There will be charges for applications and testing of competencies. The testing and provision of courses looks to be through the school Cégep de Sorel-Tracy.

Nova Scotia

The Association of Municipal Administrators, Nova Scotia (AMANS) provides a certificate recognizing educational achievement. It is a voluntary program for members of the association which began in 2000. Successful applicants are granted the title Certified Municipal Manager (CMM). The educational requirement is the completion of the NACLAA Level II certificate through Dalhousie University, or equivalent as judged by the AMANS examination body. The work experience requirement is fulfilled after five years of municipal employment as a municipal manager. Applicants must also be members of the Association, and adhere to their Code of Ethics. CMM certificate holders also have a mandatory professional development requirement. Every two years they must achieve 50 professional development points to keep their designation.

New Brunswick

The Association of Municipal Administrators of New Brunswick (AMANB) has a certification program that was initiated in 1989 through a resolution made at their annual conference. It has work experience and educational requirements, and there are three levels of certificates based on level of educational degree held by the applicant, as well as equivalent work experience based on a point system (not defined on the website). The educational requirements are generally in local government, public administration, or business administration qualifications. The Association does not offer any courses directly, rather all the recognized courses are through post-secondary institutions with the standard being Dalhousie University Continued Education and their NACLAA program.

The AMANB Level I certificate requires the NACLAA Level I certificate or equivalent. The AMANB Level II certificate requires a Bachelor's degree in Public Administration or the NACLAA Level II certificate, or equivalent. The AMANB Level III certificate requires a Master in Public Administration, 10 years work experience in a New Brunswick municipality and a Bachelor's degree in Public Administration, or equivalent.

Prince Edward Island

The PEI's Association of Municipal Administrators mandate is to aid and promote the education and professional development of municipal administrators. While the website is vague on specifics, it mentions ties and partnerships with other associations, as well as Henson College's (the defunct name of Dalhousie University's Continuing Education branch) Municipal Administration Program (now the NACLAA).

Newfoundland

The Professional Municipal Administrators – Newfoundland and Labrador does not mention certificates on their website, just a general promotion of educational programs for all municipal administrators in the province.

The Department of Municipal Affairs runs a municipal training program in collaboration with the Municipal Training and Development Corporation and other municipal associations. While the mandate is about training and the provision of courses, there is no final recognition through a certificate.

Northwest Territories

The territorial government provides courses that lead to occupational certification for municipal employees through the Department of Municipal and Community Affairs, School of Community Government. According to their website, occupational certification is based on standards that describe the skills, knowledge and attitudes needed to perform competently at work. The Department has created a competency framework for municipal occupations and their training courses are built around the framework.

Besides the training courses there are other requirements before the certificates are awarded. There is a work experience component, a written test, practical evaluations, and an assessment by a supervisor. The work experience component is usually two years of employment in the occupation or equivalent. The written test is a 100 multiple choice question test that is based on the competencies required for the occupation. The practical evaluations are written exercises that reflect actual workplace activities. Once these steps are accomplished, applicants are awarded with a Certificate of Competence under the *NWT Apprenticeship, Trades and Occupational Certification Act*.

Yukon

The Association of Yukon Communities provides training, scholarships and professional development opportunities as well as funding for municipal employees through a partnership with the territorial government. However, the association does not provide certification nor does the territorial government. Training courses are provided through

Yukon College. A certificate program for First Nations Public Administration is currently being created through Yukon College and is in the pilot program stage.

Nunavut

The Nunavut Municipal Training Organization provides training and certification to municipal employees. It was founded and funded by the Nunavut Association of Municipal Administrators and the Government of Nunavut Department of Community and Government Services. The Government of Nunavut, under the authority of the *Financial Administration Act*, provides financial support and assistance for training municipal employees. There is no legislation for municipal employee certification, only a stated desire to train for excellent in municipal employees.

The Municipal Government Certificate Program is delivered in partnership with Nunavut Arctic College. The program consists of five core courses in Management Communications, Introduction to Computers, Introduction to Northern Government, Human Resource Management, and Public Sector Finance. Successful completion of the core courses provides a “Record of Achievement”.

There is an option to take five more courses based on seven different fields of municipal work. The seven fields are: Finance Officer, Assistant SAO, Works Foreman, Recreation Leader, Office Administrator, Economic Development Officer, and Planning & Land Administrator. Successful completion of all ten courses results in a Municipal Government Certificate.

The following Table 4 summarizes the characteristics of each provincial local government certificate program.

Table 4 - Canadian Provincial Bodies Administering Local Government Certificates

| | BC | Alberta | Saskatchewan | Manitoba |
|--|---|---|---|--|
| Administrator | Board of Examiners, BC Provincial Government | Society of Local Government Managers | RMAA for rural region UMAAS for urban regions | Manitoba Municipal Administrators Association (MMAA) |
| Basic Certificate Requirements Other Certificates | <p>Service Delivery: ♦Services ♦Administration ♦Law ♦Finance</p> <p>Administration / Statutory Admin: As above, plus ♦Managing ♦Urban Economics ♦Law ♦Policy</p> <p>Executive Management: As above, plus ♦Ethics</p> <p>8 additional courses</p> <p>2-3 Diploma courses for mgmt certificates</p> | <p>Certified Local Government Managers (CLGM): 12 online non-credit courses through U of A to get Certificate in Local Authority Administration (NACLAA)</p> <p>Level I ♦LG Services + Structure ♦Administration and Ethics ♦Law ♦Org. Behaviour and Leadership ♦Finance (+3 electives)</p> <p>Level II Management ♦Citizen Engagement ♦Law II ♦Policy and Program Evaluation</p> | <p>Class C / Standard Certificate in Local Government Authority (LGA) through U of R: ♦Introduction to LGA ♦Legislation and Statute Law ♦Basic Accounting ♦LG Accounting</p> <p>Class A / Advanced I Advanced Certificate in LGA from U of R: 11 additional courses in general subjects OR Additional 15 credit hours from association list</p> <p>Superior / Advanced II: Additional 18 credit hours from association list</p> | <p>Non-credit Certificate in Manitoba Municipal Administration, through U of M:</p> <p>♦Managing HR ♦Introduction to Accounting for Managers ♦LG Accounting ♦Administration ♦Law</p> <p>1 elective from NACLAA program: ♦LG Services + Structure OR ♦Administration and Ethics</p> |
| Work Experience Required? | Yes 2-4 years of BC local government or equivalent | Yes 5 years of local government exp in Canada | Yes Class C / Standard At least 1 year in LG Class A / Advanced I At least 2 additional years or equivalent Superior / Advanced II At least 5 additional years or equivalent | No |
| Other | | <p>Must practice the CLGM Code of Ethics</p> <p>1 Alberta Government member on the Board</p> | Legislated mandatory certification for all urban and rural administrators | |

| | Ontario | Ontario | Quebec | Nova Scotia |
|--------------------------------|---|--|--|--|
| Administrator | OMMI | AMCTO | Corporation of Municipal Officers of Quebec (COMAQ) | Association of Municipal Administrators, Nova Scotia (AMANS) |
| Basic Certificate Requirements | Certified Municipal Manager (CMM): | Certified Municipal Officer (CMO): Municipal Administration Program (MAP) ♦Introduction to LG ♦Administration ♦Finance ♦Management | Authorized Municipal Officer (OMA): ♦90 credits from a recognized university ♦42 training hours from COMAQ courses | Certified Municipal Manager (CMM): ♦NACLAA Level II or equivalent |
| Other Certificates | No set courses or program Recognizes education, workshops and experience | Diploma in Municipal Administration ♦MAP ♦Finance Program ♦Law Program ♦Labour Law and HR Program Executive Diploma in Municipal Management ♦20 workshops | | |
| Work Experience Required? | Yes At least 1 year in LG | Yes At least 3 years in LG | Yes At least 3 years in LG | Yes 5 years as a municipal manager |
| Other | Legislated authority Must practice Code of Ethics | Examination component after taking courses Competency based skills and knowledge requirement No legislative authority All courses are run through the association | Must practice the COMAQ Code of Ethics OMA requires re-certification every 5 years through taking COMAQ courses Municipal Directors Association of Quebec is working on a new certification for managers | Voluntary program for members Must practice the AMANS Code of Ethics Mandatory professional development equal to 50 points every 2 years |

| | New Brunswick | Prince Edward Island | Newfoundland | Northwest Territories |
|--------------------------------|---|---|---|---|
| Administrator | Association of Municipal Administrators of New Brunswick (AMANB) | Association of Municipal Administrators, Prince Edward Island | Professional Municipal Administrators – Newfoundland and Labrador | Department of Municipal and Community Affairs |
| Basic Certificate Requirements | Level I: ♦NACLAA Level I or equivalent | Mention of NACLAA program | None | Certificate of Competence: |
| Other Certificates | Level II ♦NACLAA Level II or equivalent Level III ♦Master in Public Administration or equivalent | | | ♦Skills Assessment Checklist based on competencies |
| Work Experience Required? | Yes Point system (undefined) | N/A | N/A | Yes At least 2 years in the occupation or equivalent |
| Other | Must be a AMANB member for 2 years | | | ♦Legislated authority ♦Written test ♦Practical Evaluation ♦Supervisor Assessment |

| | Yukon | Nunavut | | |
|--------------------------------|----------------------------------|--|--|--|
| Administrator | Association of Yukon Communities | Nunavut Municipal Training Organization | | |
| Basic Certificate Requirements | None | Record of Achievement: ♦Management Communications ♦Intro to Computers ♦Intro to Northern Government ♦HR Management ♦Finance | | |
| Other Certificates | | Municipal Government Certificate: ♦5 additional courses in specific occupations | | |
| Work Experience Required? | N/A | No | | |
| Other | | | | |

Other Countries and Institutions

USA - International City/County Management Association (ICMA)

The International City/County Management Association's mission is to create excellence in local governance by developing and fostering professional local government management. While based in the US, they have a worldwide focus. The ICMA University branch offers credentials for municipal managers. Their voluntary designation is called the ICMA Credentialed Manager. To receive this designation, an applicant must be a member of ICMA, must adhere to their Code of Ethics, must have at least 5 years work experience in local government, or have a strong connection to local government, must have at least a bachelor's degree from an accredited university, and finally must pass an online multiple choice assessment test measuring the skills and knowledge deemed necessary for local government managers. The skills and knowledge are derived from the association's 18 core competencies, which were designed with the association members input. Every 5 years a performance based assessment is necessary to maintain the designation.

USA - International Institute of Municipal Clerks (IIMC)

The International Institute of Municipal Clerks is a professional, non-profit association that promotes professional development and certification through university and college-based institutes. The IICM has two recognition programs, the Certified Municipal Clerk (CMC) designation and the Master Municipal Clerk (MMC) designation. The CMC program requires membership in the IICM, a job title of clerk or equivalent, 60 points of education and 50 points of work experience based on their point system, and must practice their Code of Ethics. The LGMA and Capilano University MATI courses are eligible for the education component, as are the NACLAA program and the AMCTO program. The MMC designation requires a CMC designation, a further 60 points in Advanced Education, and 40 points in professional and social contributions.

UK and Australia - Competency Frameworks

The certification system for local government training is built around national vocational qualifications (NVQs), like many other professions and trades in these countries. The framework was designed by the national government and the post-secondary institutions. The certificates are a measure of vocational training and it is difficult to compare to the Canadian system. Even when Canadian public sectors use competency frameworks, the comparison between Canada and UK/Australia is different. The Canadian system is based on the North American theory of competency, where behaviours are the output based on performance. The UK/Australia theory of competency is focused on the input of competencies in vocational training.

Conclusion

Compared to other provincial local government employee certification programs, B.C. is unique in its delivery and comprehensive in its content. Key points from other jurisdictions include: an ethics component for all certificates, a mandatory certification program in Saskatchewan, and a strong partnership between five provinces in the University of Dalhousie and Alberta Local Authority Administration program.

CONSULTATION FINDINGS

This section provides a summary of the views, thoughts, and feedback from the consultation with Board of Examiner stakeholders. The consultation was conducted through two focus groups involving local government managers, a series of interviews with local government elected officials, and a survey of local government employees and students in local government courses. It consists of four subsections, the first dealing with the manager focus group, the second with the Chief Administrative Officer (CAO) focus group, the third concerns the elected officials' interview results, and the final subsection presents the survey results.

The manager focus group findings touch on:

- Caution regarding the use of the term 'competency'
- Reinforcement of current skills and knowledge subject areas
- Introduction of new skills and knowledge that should be required
- Areas of general improvement for BOE certificates

The Chief Administrative Officer focus group findings touch on:

- New skills and knowledge
- Avoiding new barriers
- Value of work experience
- General improvements to BOE certificates

The elected officials' interviews touch on:

- The importance of political savvy for CAOs
- Educational requirements of a CAO
- Skills to be a 'balanced' CAO
- Key knowledge areas and a thirst for knowledge
- General skills and knowledge for local government staff
- General improvements to BOE certificates

The survey results touch on:

- Demographics of respondents and relevance to findings
- Perceived value of the BOE certificates
- Challenges to certification and reinforcement of the expected issues
- Suggestions for the BOE

Manager Focus Group

The session began with a roll-call, followed by a reminder of the signed consent form and its implications, and verbal confirmation that the conversation was being recorded. The purpose of the focus group was introduced, with another brief overview of the Board of Examiners since the participants all acknowledged they were aware of it. The working

definition of ‘competency’ was introduced, followed by an open question regarding the definition.

Several participants raised a warning flag about the use of the term ‘competency’, especially within a regulation that will hopefully be a long-lasting document. The term ‘competency’ was called a buzz word and a “flavour of the month”. The participants were satisfied with the term ‘skills and knowledge’ instead. After the introduction, the topical questions were asked and discussed, with the results summarized in the following paragraphs.

Current Skills and Knowledge

Several suggestions reinforced the existing core subject areas for the certificates. One knowledge area that received unanimous support was the knowledge of the overarching structure and bodies of government at all levels, from federal to provincial to local governments in a B.C. context. This includes local government policies, bylaws, the *Local Government Act*, the *Community Charter*, regional districts, improvement districts, and how local government corporate strategic plans should fit into provincial and federal plans. These comments stem from the surprise that managers felt at the general ignorance of staff regarding the different levels of government. In small towns there is a knee-jerk reaction to problems without following the strategic direction of Council, based on old school thinking. At the very least there needs to be a quick snapshot of how the levels of government interact.

Finance was another knowledge area covered by the existing certificates that was reinforced in the discussion. Participants emphasized that out of all the core courses, they received comments from staff that finance was the most enlightening course for general non-financial staff. It is beneficial for everyone, especially middle to upper levels of management, to have a general idea of local government finances and an awareness of financial obligations in legislation.

There was a note of caution, though, that blinders to financial obligations can develop over time. While clerks go to law seminars, they do not attend Government Finance Officers Association of BC (GFOA) boot camps, which could be beneficial for all management. This brought the discussion to one of continuous learning in order to maintain and improve an individual’s knowledge base. Currently only the Certificate in Local Government Executive Management has an option of professional development endorsement. The topic of having to be re-certified after a certain number of years was introduced as an idea for further discussion.

New Skills and Knowledge

New areas of knowledge and skill were also discussed in the session. Communication skills, conflict resolution, awareness of human resource issues, project management, and emergency management were all put forward as required knowledge and skills for local government employees. For CAOs specifically, a high level of all these areas plus political awareness is a necessity.

Table 5 - Manager Focus Group New Skills and Knowledge

| Subject Area | |
|---------------------------|---|
| Communication Skills | <p>Communication skills, both written and oral, were emphasized in particular. One participant said that while writing can be worked on over time, public speaking and making presentations are key skills because of the public nature of local government and ongoing communication with Councils, the public, staff, and other levels of government. The basics of how to do PowerPoint presentations would be useful. This was countered with the importance of written communication skills and the ability to write simple, not overly complicated, documents. The value of written skills for meeting minutes, briefing notes, memos, letters to the public, etc, should be highlighted in courses.</p> <p>Communication skills are necessary in order to put the best face forward. Communications must hit all the points of concern simply and succinctly, there should be an awareness of blind spots, communications should be memorable and incorporate an aspect of storytelling, the audience must be understood, and it must remind the public that the local government is taking care of their citizens needs. For general employees there should be an understanding of their role in local government and how to communicate that role to the public. The idea of customer service quality processes, such as using ISO programs, was also discussed.</p> |
| Conflict Resolution | <p>This was unanimously approved as necessary. It is important for managers of all levels, and especially for senior managers. Political issues polarize groups both in Council and in the public. It was noted that the public does not call city hall to say good job, but rather the public calls when they are not happy, angry and disappointed. In general the public is opposed to local government because they are the government. Proper training in conflict resolution is central to diffusing tense situations.</p> |
| Human Resources Knowledge | <p>A human resources (HR) component was also identified as a useful knowledge area, particularly for managers and supervisors. Dealing with staff, understanding discipline processes, how and when to contact lawyers, are all useful for managers. HR knowledge is even more relevant for small municipalities who likely do not have an HR department.</p> |
| Project Management | <p>Workload planning, strategic planning, how to ensure that work is proceeding in an orderly fashion based on priorities set by Council and senior managers. This includes how to track and be aware of the work of others in the municipality.</p> |
| Emergency Management | <p>This emerged as a skill for all employees. Several participants in the focus group stated that they have all their staff undergo such training, usually through the Justice Institute of BC's "Intro to Emergency Management". The reason stated is because employees are like deer in headlights without taking the course. The reason for the course is to enable staff to act as efficient support to Incident Command when emergencies arise. This suggestion was unanimously approved by all participants.</p> |

There was discussion over the specific knowledge and skills required for senior managers. The previous suggestions were all reiterated, with the comment that there should be a higher level of understanding for CAOs. The conflict resolution skill was argued as crucial to a CAO, as they are the focal point between Council and staff and are always in the hot seat. CAOs need to have knowledge of all the local government operations, and taking courses such as the MATI courses, GFOA boot camps, legal seminars, and Justice Institute of BC courses are beneficial. Although it is not a skill or knowledge, it was agreed that CAOs need to be politically aware and savvy, in order to negotiate political minefields.

BOE Certificate Areas of Improvement

Some of the challenges and weaknesses of the BOE certificates were also discussed. These included the Certificate in Local Government Statutory Administration, the dilemma of work experience as a requirement versus a broader target audience for the certificates, promotion of the certificates, a lack of face-to-face courses, funding, and work experience equivalencies.

There was talk about dropping the Certificate in Local Government Statutory Administration for financial officers, as they have their own specific designation requirements for being hired in that position. Because the core courses are exactly the same as other administrative positions, with only the work experience being different, it was suggested that the certificate held no meaning as a credential for that position. There was discussion over the lumping of roles into certificates, where clerks and approving officer's fall under the same certificate but their roles are vastly different.

One of the stumbling blocks of the certificates is that it recognizes those who have already achieved a certain level of performance in local government. It is a catch-22 where you can't get a certificate until you are working for local government, but to work for local government it would be an asset to have a certificate. However, the work experience is necessary for recognition because training and education is not the same as practical experience. The participants recommended leaving in the work experience because it is a measure of survival in local government. Analogies were drawn to other professions such as engineers and accountants, and it was argued that local government employees are professionals, too. They are seasoned and well educated and deserve to be recognized. However, it was acknowledged that the certificates also act as a barrier to new recruits to local government and changes should be made to allow recognition of those without work experience. The courses taken for the certificates could be a measure of practical experience through the course assignments.

Promotion of the BOE certificates needs to be stronger. There are opportunities for raising awareness that should be pursued by all parties. There were comments that there is no emphasis on the certificates in local government courses, during LGMA regional meetings and workshops, and at conferences. The certificates are only talked about lightly and not much weight is put on them in many municipalities. Certificates are pursued on individual staff's initiative, rather than encouraged by local governments. It was acknowledged that it is a gap in the local government industry that the certificates

are not promoted more. Post-secondary institutions that have local government courses should be actively promoting the certificates, particularly the University of Victoria. Furthermore, graduates of UVic's School of Public Administration along with current BOE certificate holders should be promoting the certificates. A suggestion was given for another study correlating people's participation in the BOE certificate program with their career advancement over time. This would potentially provide evidence of the strength and worth of the certificates.

Finally, there were some general comments on the BOE certificates. It was recognized that distance courses are the only option for many students, but they are not as effective as attending in person. One participant subjectively measured distance courses as 80% effective. There were suggestions that LGMA meetings and conferences, along with the MATI courses can be used to bridge the gap. There were comments over the price of courses such as MATI, but the price was defended because a \$2000 course could be justified by a single informed decision or recommendation. Following the discourse on cost, the issue of funding and scholarships was touched upon. If the cost of courses was preventing more local government employees from attending, then there should be funding to supplement students and encourage their professional development. The focus group session ended with a final comment on the work experience equivalency formula and how the ratio for other provincial local government experience was too low.

The session ended with a final thank you to the participants, a reminder that their input will remain confidential, and an invitation to send more feedback through email or telephone if they had something new to add.

Chief Administrative Officer Focus Group

The session began with a roll-call, followed by a reminder of the signed consent form and its implications, and verbal confirmation that the conversation was being recorded. The purpose of the focus group was reiterated, and the working definition of 'competency' was explained followed by an open question regarding the understanding of the definition. Then the first question on the agenda was asked and the session began in earnest.

New Skills and Knowledge

Table 6 - CAO Focus Group New Skills and Knowledge

| Subject Area | |
|---------------|--|
| Communication | Communications, focused on writing and speaking, should be a course in itself. One participant stated that the four core courses could be set aside in exchange for communications. Tied into communications is relationship building, where a course could teach how to build relationships internally, within the community, with other local governments, and with other levels of government. The MATI Advanced Communications course was touted as a perfect fit. This led to a discussion about the cost and availability of the MATI courses, and their usefulness. |

| | |
|----------------------------------|---|
| Collaboration / Work in Teams | Collaboration and the ability to work in teams were discussed as a required skill, both within the local government organization and outside the office. This was put forward as a desired skill because working with other staff, the community, council, stakeholders and other governments is a large component of daily work. Furthermore the millennial generation work in teams more so than previous generations and that element should be incorporated into local governments. |
| Ethics | Ethics was discussed as another potential new knowledge area, especially as a requirement for all manager certificates. However, the participants felt it was more appropriate to include ethics as a component in another course. Ethics could be included as a strong component in the Law course, either the Core 4 Law course or the Core 7 UVic Law course. |
| Adaptability | Adaptability was the first skill introduced in the discussion, although it was admitted that it is a challenge to put that into a course context. However, it was also said that adaptability would be gained through work experience as well as in course work through hearing and studying different points of view and experiences. |
| Emergency Management | Emergency management, while valuable, does not need to be a course on its own. It can be included as a component in the Services course, or kept as a subject area for one of the eight 'other' courses, or highlighted as a recommended 'other' course. Municipalities can put their own employees through the Justice Institute of BC's introductory course to emergency preparedness. |
| Personal Mastery | Personal mastery was expounded upon, defining it as personal insight and an awareness of yourself and your impact on others. It means to understand your strengths and weaknesses and how to leverage them to best effect. This is knowledge that is essential to a good CAO in particular. |

Although it is not a new knowledge base, there was discussion to expand the Local Government Services course. This course is what local government is all about and to have a real appreciation of what a municipality does would take two courses. The core courses in finance, law and administration are all focused and can be done in one course each, but services should be expanded in order to cover each local government department and service adequately.

Other skills and knowledge mentioned in the session were conflict resolution, customer service, and strategic agility, which is essentially strategic planning with a description that sounds more flexible than 'planning'.

Avoid New Barriers

There was caution about adding more course requirements for the certificates. There is already the challenge to find the time to meet the current requirements, and any additional courses will add to that burden. Participants said that in their view, and knowing the opinion of others, the certificates were broad enough already. More courses

would not be beneficial. However, other participants said that there are options to move around some of the current requirements, either lumping courses together, or putting more emphasis on certain 'other' credit course requirements.

Value of Work Experience

It was unanimous that the work experience requirement is a valuable component of the certificates. Lots of people have education or can receive education, but the work experience is always necessary. The BOE certificates are something to work towards while in government, not something to get before being hired. Aptitude and attitude is more important in hiring than knowledge. Organizations, when looking for recruits, should find the right fit for their culture first, and then the training can come through the BOE required courses.

There is no value in a dual stream, two-tier certificate system because the focus of the BOE core courses is for those already employed in local government. Some post-secondary institutions who offer local government courses have the pre-requisite that students must already be employed by a local government. The certification through the Board of Examiners is an example of professional accreditation, not just education.

This was followed by a brief discussion over the possibility of getting the local government profession legally recognized through legislation. The BOE certificates could begin to pave the way for such legislation.

General Improvements to BOE Certificates

A paradigm shift in the BOE certificates, from an outlook of **what** is being done in local government, to **how** things are done in local government, could be more interesting, less dry, and more practical for the workplace. This would require a major re-working of the certificates, which was concluded to be not beneficial as there was such a major re-working in 2005. There was concern that this was not the best solution. Some participants noted that the BOE certificates gained prior to 2005 are perceived as inferior by some local governments. Therefore a major re-working of the BOE certificate framework could inflict the same perception of inferiority on the current certificates.

There was talk that the biggest question the participants hear about the BOE certificates is about what the requirements are, and what is and is not equivalent to the core courses. The BOE certificate is a good program that does not require a lot of changing, however if there are changes then avoid creating new barriers for applicants.

Finally, there was the point that courses should not be limited to specific universities or schools. The opportunities should open up and broaden, even going beyond B.C. to include other provinces and their programs, as well American institutions. It was acknowledged that the *Community Charter* and other unique B.C. legislation should remain a big requirement.

Elected Officials' Interviews

Prior to the interview, each elected official was sent a primer document similar to the document used for the focus groups, although the questions asked were different and the call-in procedure for a teleconference call was not required. Each telephone interview began with a confirmation that the elected officials' primer document was read, or at least glanced through, followed with a brief re-explanation of the nature of the report, the role of the Board of Examiners, and the definition of 'competency'. The phone interviews were not recorded. The results of each interview have been amalgamated for the purposes of reporting the findings.

Politically Savvy

A constant point brought up during the interviews was the need for CAOs to be politically savvy. CAOs need to be highly aware of all members of Council and how they interact. They must have a high level of discretion, treat all Councillors equally and ensure that they all share the same knowledge base and to what extent Council should be informed.

Educational Requirements

All elected officials look for considerable experience in their CAOs, and people who have been employed in the region are seen as a better fit because they know the tone of the area. One official commented that it is better to 'grow' your own managers and CAOs than hire from outside. CAOs are expected to have a working knowledge of all the departments in local government and some higher education is preferred, though not required. Years of experience in local government management can often be equivalent or better than academic instruction.

A 'Balanced' CAO

Leadership training is an absolute requirement for CAOs. Leadership experience will likely have come through previous experience as a manager. However it is an asset to have attended leadership training programs, such as those offered at Royal Roads and other schools. Part of the leadership training should be an awareness of self and personal mastery. One elected official used the term 'balanced', both in personality and in work. CAOs are the pivot in the middle of a seesaw between the council and staff and the public.

Additional skills that bolster the 'balanced' role are active listening, communication skills, a strong sense of ethics and integrity, mediation and conflict resolution, the ability to delegate, and respect. Respect in terms of being respected and being respectful. Using these skills the CAO creates the atmosphere of the municipality, taking what Council wants and making it happen with staff. They are the supporters of Council and cheerleaders of staff. Diplomacy is an absolute fundamental skill for CAOs.

CAO Knowledge

A required knowledge base for CAOs is legislative and labour law. This is broader than municipal legislation (i.e. *Local Government Act* and *Community Charter*) and includes other relevant acts (*Motor Vehicle Act*, etc), provincial and federal legislation. Labour

law is important because of the interaction with unionized staff. One elected official emphasized that a key trait for CAOs is a general thirst for knowledge. This is a trait that separates excellent CAOs from average ones, along with a desire to go into the unknown by exploring and learning new possibilities and opportunities.

General Skills and Knowledge for Staff

The elected officials were also asked to provide insight on skills and knowledge for general local government employees. While they acknowledged that each job has their own technical requirements, there are some fundamentals for all staff. First, customer service and knowing how to deal with the public, and an awareness that local government staff are the face of the organization is absolutely fundamental. Second, active listening and addressing the common public frustration of not receiving an answer or being acknowledged is important. The third fundamental is respecting confidentiality and having knowledge of the *Freedom of Information and Privacy Act* requirements. Finally, it is important that staff have an awareness that local government works for the public.

General Improvements to BOE Certificates

General suggestions to improve the BOE certificates included additional funding, adding an ethics component, adding an element of customer service and/or relations, involve practical experience in course content, and increase the promotion and visibility of the program.

Additional funding through scholarships would help smaller municipalities put their employees through local government programs. It was suggested that a funding pool could be created through UBCM, the MFA, local governments, schools, and provincial sources.

An ethics component should be added to the certificate core courses because ethics translates into values, which translates into better service and attitude. There is a deep distrust from the public towards government and an ethics component in training can help mitigate that distrust by establishing some accountability.

The elected officials reinforced the point that local government is about customer service to the voting public, and therefore an awareness of customer service and customer relations is essential. This will help put 'service' back into government by moving to a customer focus.

Involving practical experience in the core courses will root the academic learning in real challenges and produce real results.

The BOE certificates are recognized, although not universally. They are a valuable training mechanism, a mark of genuine achievement through professional development and work experience and should be promoted more vigorously.

Survey Results

The survey findings are divided into sections according to the survey framework. The entire set of survey results is reproduced in Appendix H. The first section looks at the general demographics of the survey respondents, as well as their overall perception of the Board of Examiners. The following three sections will focus on the survey questions that elicited detailed feedback from the respondents. The three questions concentrated on the perceived value of the certificates, the challenges in obtaining a certificate, and suggestions for the BOE.

General Demographics

Seventy-two percent (72%) of the respondents are between the ages of 36 and 55, which is not surprising considering the bulk of the respondents are from the LGMA and likely in management positions. Ninety-one percent (91%) have some kind of post-secondary certification or degree already, either from their own education or because they already have a BOE certificate. 54% work in general administration, with an additional 27% in finance, planning or engineering.

Figure 2 shows the widely spread locations where the respondents work. It indicates the survey has a representative sample of B.C. local government employees according to population density.

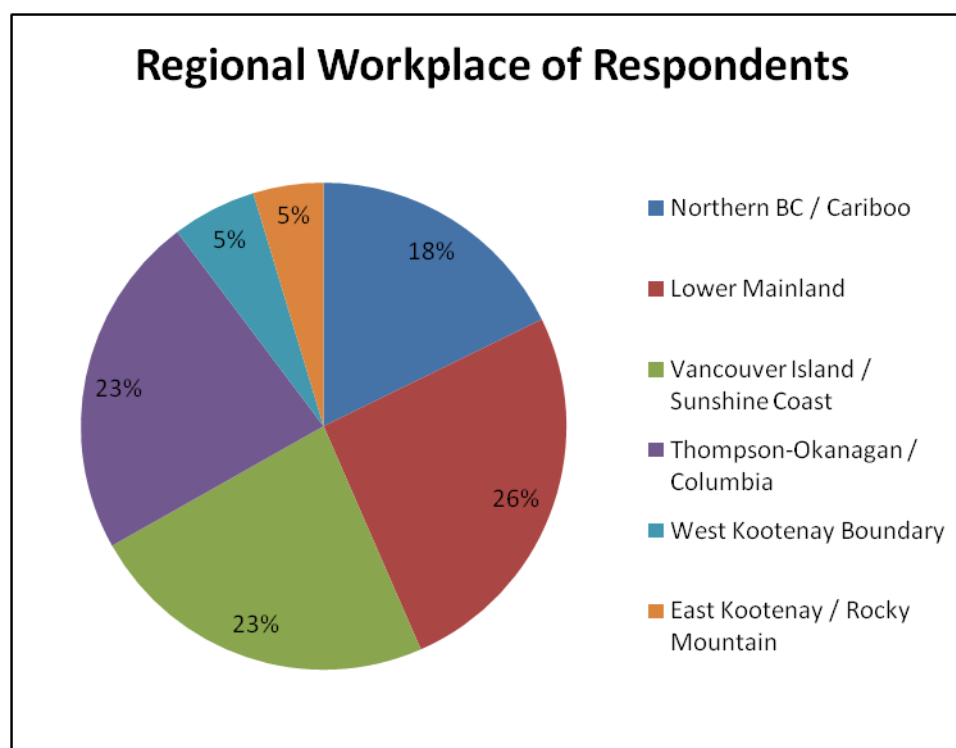


Figure 2 - Regional Breakdown of Survey Respondents

One of the survey questions was about awareness of the Board of Examiners certificates prior to receiving the survey. The results were a strong confirmation that a significant portion of respondents are aware of the certificates.

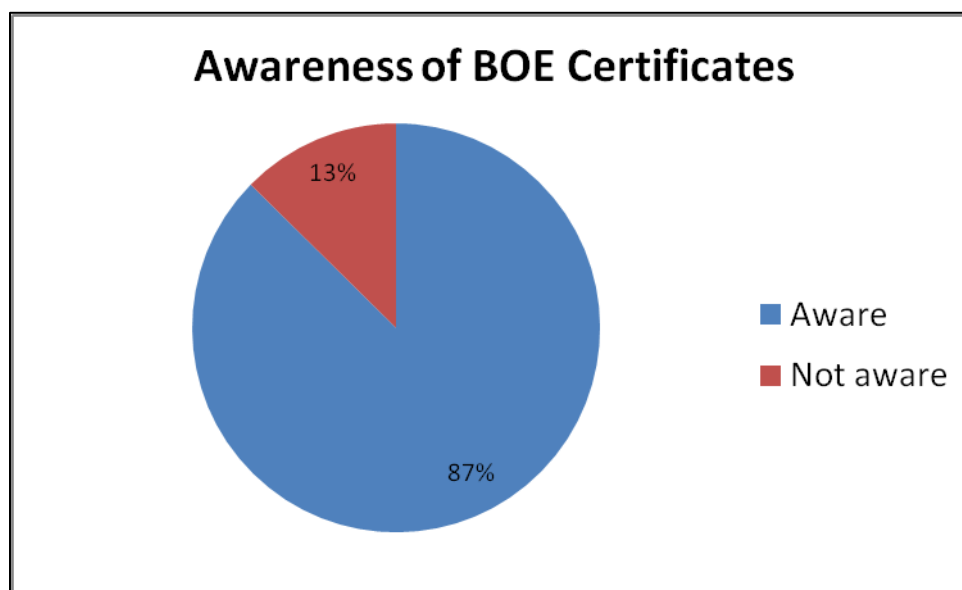


Figure 3 - Percentage of Respondents Aware of the Board of Examiners

However, only 35% of respondents answered they currently have a BOE certificate, and of those a little under half answered their certificates were received prior to the 2005 BOE *Regulation*. Moreover, 64% of 208 respondents said they were not actively working towards a BOE certificate. Of the remaining respondents, 10% are working towards a Certificate in Service Delivery, 14% are working towards a Certificate in Administration, 8% are working towards a Certificate in Statutory Administration, and 4% are working towards a Certificate in Executive Management. Surprisingly, though, 63% said the certificates were at least somewhat important to their career aspirations.

One of the most important questions for the report was the identification of challenges towards obtaining a BOE certificate. A list of ten challenges, based on applicant feedback the BOE Administrator had received informally, was provided and respondents ranked their challenges in order of significance. For the purposes of displaying a clearer picture, points were assigned to each ranking. A respondent's number one choice received ten points, their second choice nine points and so on. Not all respondents ranked all the challenges, therefore only their ranked choices received points. Rather than skew the point totals, this should clearly identify the most important challenges.

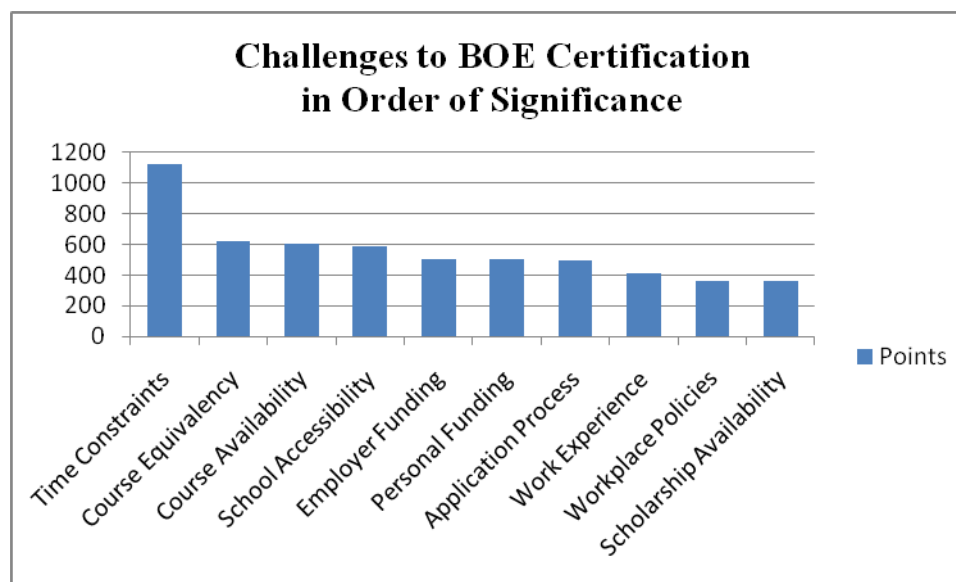


Figure 4 - Challenges to BOE in Order of Significance

Personal time constraints are by far the most significant challenge for respondents in receiving a Board of Examiners certificate. Following time constraints, the most significant challenges reinforce the original issues of the client. Course equivalency, course availability and school accessibility were all challenges that prompted a review into the BOE program.

Perceived Value of the Certificates

Respondent feedback for this question was clustered around a few dominant themes. Many respondents found value in the training and professional development aspect, others focused more on the career and resume building side, still others commented on the qualifications and standards that the certification provides, and there were those who did not see value in the certificates.

Among the answers, many respondents (33%) focused on the value of the certificates in regards to training and professional development. The certificates are valuable because they provide an education directly related to local government and challenges unique to local government. The training allows employees to stay on top of their game. Those employees who do not have the certificates do not always know the processes and reasons for decisions in local government. The training leads to producing more valuable work for their employers. Finally, the courses also provide opportunities to network with fellow students and therefore expand your support base.

Career opportunities and resume building was another area of feedback. Pursuing the BOE certificates shows personal initiative and increases the credibility of the recipient. While the survey indicates that the certificate is not often a requirement in job postings, the focus group findings show that the certificate is noticed on a resume. Therefore the possession of a certificate and identifying that on a resume is clearly an advantage over other candidates for local government jobs.

Respondents commented on the qualifications and standards the certificate offers recipients. There was emphasis on the fact that the certificates create a minimum standard of skills and knowledge which are required in local government. The certificate is a benchmark to measure against, whether that is against employees, other provinces, or local government expertise. The certificates also acknowledge both the educational learning and the practical work experience. There is limited opportunity for local government recognition and the certificates are one of the only means of such recognition. Finally, it promotes uniformity amongst the jobs across B.C. and ensures a standard of local government education across the province.

There were a few respondents (10%) who did not see the value of a BOE certificate. They stated that other degrees and certifications, through schools or associations, already covered recognition. There is no value because the BOE certificates are redundant. Others complained the process to receive a certificate was too cumbersome for it to have value for them. There was the comment that because local governments were not asking for the certificates on a resume, the certificates had no value. Finally, there were some respondents who said that the value of the education was worthwhile, but not the piece of paper itself.

The Challenges to BOE Certification

As seen in Figure 4 above, time constraints are the most prominent challenge in achieving a certificate according to the survey. The other prominent challenges of course equivalency, course availability and school accessibility were known as issues beforehand, they were the catalyst to this project, and they have been confirmed through the survey. While the rankings in Figure 4 indicate funding as the next two most important challenges, in contrast the survey feedback from the open questions focus more on the application process challenges.

Personal time constraints are the most prominent challenge to completing and receiving BOE certification. Some respondents (25%) raised the issue of work/life balance. Regardless of whether respondents actually do not have free time, or if they choose to spend their free time pursuing other activities, the end result is that they believe they have no time to pursue a BOE certificate and it is not a priority.

The second most significant challenge according to the survey is course equivalency. The comments focus around the lack of information and confusion regarding what is equivalent to the core courses. Respondents want to use courses from B.C. institutions, from other Canadian institutions, and from other countries. Some respondents do not want the courses tied to a particular school. The process of equivalencies is not understood and respondents do not know why some courses are equivalent or not, why some degrees provide no equivalency and some do, and why some older courses may no longer be acceptable.

Course availability and school accessibility were the next two significant challenges according to the respondents. The most common comment for course availability was the

lack of opportunity for people in the north and central BC who are unable to attend an in-person class. Another comment was the inconsistency of course offerings from certain institutions. When courses are only offered through a single institution and there are semesters when a course is not offered it can delay the BOE certification process by months if not years. People would prefer to be able to take all the core courses through their local institution. Furthermore, courses at their local institutions would save time and money for both local governments and students.

There were comments on the BOE application process. There were two streams of these comments, the first stream dealt with the number of requirements when applying for certification and the second stream dealt with the actual application process. A small number of respondents (less than 5%) complained the certification process was too long and cumbersome to get all the requirements. There were comments about the lack of information on the application process and the difficulty in using the BOE website seeking clarification. Comments about application confusion were compounded by the confusion over whom to ask for help and advice. These issues were mitigated somewhat by other respondents responding positively about the ease of application and the helpful advice they received from both the website and staff.

Some other miscellaneous comments mentioned by respondents concerned:

- Work experience and the difficulty in gaining experience in a job being pursued
- The difficulty in getting scholarships
- Misunderstanding between MATI courses and BOE certification
- A lack of ‘work-related’ courses for the other course requirements; and
- The certificate titles are too broad and they recognize job titles not work content

Suggestions for the BOE

There were a number of suggestions offered by respondents to improve the BOE certificates. For a summary of the prevalent suggestions, please see Appendix G.

Conclusions

The consultation piece involved two focus groups with local government managers, interviews with elected officials, and a general survey of local government employees. The challenges of course equivalency, course availability and school accessibility that initiated the review of the BOE program were confirmed and new challenges, primarily time constraints, were identified. Feedback from the focus groups and interviews offered new skills and knowledge required for local government employees and management, predominantly in communications and ethics. Survey respondents also provided information on their perception of the program and revealed some misconceptions of the Board of Examiners program. The findings summarized the consultation feedback and the discussion section will reflect on the implications of the findings.

DISCUSSION

This section brings together the findings from the background section, literature review, jurisdictional scan, and the consultation piece to weave a narrative thread with the goal of identifying strategies and solutions to the challenges identified in this report. Seven objectives and principles will guide the discussion and the recommendations that follow. They were designed in consultation with the client and the Board of Examiners, designed around the report's identified challenges, and inspired by many of the principles from the 2004 Discussion Paper, which are still relevant and applicable to the current review.

Seven Objectives and Principles to Guide the Discussion

- 1- To address the challenges concerning the BOE program identified in this report;
- 2- To ensure that the BOE program remains viable, beneficial, and a sought after option;
- 3- To keep the certificates simple and easy to follow;
- 4- To make the BOE certificates accessible to as broad an audience as possible;
- 5- To make the educational requirements for BOE certificates as broad and flexible as possible;
- 6- To equip local government staff with the necessary skills and knowledge to give good and reliable advice to Councils and Boards; and
- 7- To provide certification that appropriately recognizes local government employee achievements.

The discussion has been divided into six sub-sections: addressing the current framework, lessons learned from consultations, lessons learned from other jurisdictions, general topics of discussion, mandatory certification, and creating a BOE competency model.

Addressing the Current Framework

Role of the certificates

The *Local Government Act* states that the Board of Examiners may establish qualifications and standards according to office and grades. The BOE website states the goal is to improve the skills of local government employees. There is feedback that work experience is a barrier and that a broader applicant base would be beneficial. This brings into question the future role of the Board of Examiners. Either the certificates can be expanded to include more potential applicants, or it can remain focused on current local government employees only.

The benefit of keeping it exclusive to current employees is a higher standard of certificate can be maintained. An argument for professional accreditation can grow around the certificates if the standard of both educational requirements and work experience is kept high. If some standards are removed, such as the work experience component, then the quality of the certificate may appear diluted to those who currently value and want to hold the certificates. However, expanding the certificates to a broader applicant base

would potentially increase the number of students in local government courses, increase the number of people educated in local government, and increase the pool of capable recruits.

Keeping the current framework versus a new framework

A major change in the certificate framework is unnecessary because the current framework is reliable and is accepted as a standard by stakeholders. Many of the required skills and knowledge discovered or vetted through the consultations are already in the *Regulation*, and there is sequential laddering from the Service Delivery to the Executive Management certificate.

The first four core courses would remain the same while the latter five core courses could be reworked to not be institution specific without changing the overall framework. The basic subject areas would remain as they are written in the current *Regulation* definitions. The “public sector management” subject area may need to be better defined. Currently that subject area could imply ethics, management, leadership, negotiation, mediation, something else, or all of the above.

A major overhaul would be more detrimental than beneficial because the current certificates would be phased out unnecessarily. The most frequent concerns about the current certification process deal with course equivalencies, course availability and time constraints. The concerns do not criticize the current framework. Some content should be changed with stakeholder consultation, although the basic overall structure should not be altered. Feedback indicates that another shift in the certificates would be detrimental to the value of past certificates.

There could be an addition concerning B.C. context to the definition of subject areas, to strengthen the argument that B.C. local government employees should be aware of B.C. issues and standards. This would help in guiding judgements on other provincial course equivalencies as well, where generic local government issues are important, however the emphasis for BOE certificates is the BC context. Therefore other provincial courses could be used for additional credits rather than equivalent to the core courses.

Lessons Learned from Consultations

Changes to specific courses mentioned in the Regulation and BOE Policies

By removing specific courses from the *Regulation* and policies, it removes the necessity to consult institutions for what is equivalent by their standards. It opens up interpretation for the Board and they could make their own decisions of equivalency, provided they had the right tools and capacity. Consultation can, and should, still occur with B.C. institutions to find out the value of courses, to seek advice, and to maintain communication and good relations. This would hopefully decrease the prevalence of the confirmed challenges in course equivalency. Furthermore, by removing specific institutions and courses from the *Regulation*, it creates opportunity for other B.C. institutions to offer the same courses. This would hopefully increase the prevalence of course availability and accessibility to educational institutions. Specifically, this means

removing the specific references to University of Victoria courses from Policy 1 and replacing them with generic titles like the core courses 1 through 4. Criteria such as courses must be at the 300 or 400 level could be included in the policy, to maintain high standards for the courses and the certificates.

Some name change suggestions for the specific course titles, from old to new, include:

ADMN 312 Managing in Public and Non-Profit Organizations = Leadership and Management

ADMN 445 Regional and Urban Economics = Rural and Urban Economics

ADMN 452 Local Government Law = Local Government Law II

ADMN 465 Local Government Policy = Local Government Policy

New subject areas for courses of study

Table 7 - New Subject Areas for Courses of Study

| Subject Area | |
|---------------------------------|--|
| Communication | Communication, written and oral, with a focus on customer service, was a recurring theme in the consultation piece. Communications implies writing and verbal skills, public speaking, media relations, and citizen engagement. Training all local government employees to have communication skills would be beneficial for the municipality's image and would re-align and strengthen the focus back to customer service. A course in Communication would be beneficial for both internal and external communications, whether the format is a presentation or a letter. |
| Conflict Resolution & Mediation | This was another subject area that came up frequently during the focus groups and interviews, especially for senior managers. Local government work involves meeting with an active public, other governments, and council. Those meetings can become confrontational and often involve emotional issues. There is demand to have a skill set to deal with this potential conflict. |
| Emergency Services | This area was a topic of discussion in the focus groups and interviews. Managers thought that a mandatory course in emergency services would be beneficial for all employees. Aiding, rather than impeding, during an emergency would be beneficial. However, as pointed out by the CAO focus group, this area is best covered by the individual local governments for two reasons. First, only the Justice Institute of BC offers an appropriate credit course. The second reason is that while it is beneficial, it is not an appropriate core course for the certificates. It remains an appropriate subject area in the 'other' credit course section. |
| Ethics | This was an important issue raised through the other report sections and it deserved its own subsection within the discussion section. |
| Labour Law | Local government managers must deal with unions on a frequent basis. Gaining experience and knowledge in this area could be a real asset. While it could be incorporated as an additional unit in the current law course, there is benefit to having a separate course, along with case law, for the management certificates. |

| | |
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| Personal Mastery | While personal mastery was a favoured subject area for a few focus group participants, it can be covered under general management or leadership courses, or in the ‘other’ credit courses. While a balanced and emotionally mature manager is desirable, it can be achieved through other means and does not deserve a course on its own. |
| Project Management and Strategic Planning | This was another study area for managers that emerged from the focus groups and interviews. It should not be assumed that employees who are promoted to managerial roles have experience in project management and strategic planning. To create higher value in the management certificates it would be worthwhile to include a course in this area. |

A final new course is the idea of an independent study opportunity for CAOs. The confirmation that a good CAO has a thirst for knowledge came through the consultations. Allowing a CAO to pursue their interests, or an interest relevant to their local government could be beneficial. Moreover, an applicant to the Executive Management certificate must currently give an oral or written presentation on a topic related to local government administration to the Board of Examiners. These reports are published on the CivicInfo BC website and have lasting value. To increase their value, by strengthening the academic portion of the presentation, the presentations can be an output of an academic course. Through a Directed Studies course, a CAO would choose a topic of their own interest and work with a teacher (which could be a mentor CAO or an academic) to write a detailed report. The executive summary of that report could become the CAO’s presentation to the Board. This option would likely be more intensive than a regular course and could be balanced by the removal of other credit courses required for the Executive Management certificate.

Adding extra course requirements

It is tempting to add more educational requirements to make the certificates more robust and achieve a higher standard of quality. However, feedback from the surveys and focus groups indicates that time constraints, and other school issues, must be considered. The focus groups were a mix of approval and concern over adding new content requirements.

However, there is room to manoeuvre with the ‘other’ eight credit courses. Some of the ‘other’ courses could be chosen from a limited list, including: leadership, emergency services, conflict resolution, personal mastery, communications, etc. Alternatively, the number of ‘other’ courses required could be reduced and the number of core courses increased, to address the specific course suggestions from the consultations. New core course suggestions include Communications, Case and Labour Law, Project Management, Conflict Resolution, and Ethics.

The issue of time constraints

In the survey the main barrier and challenge for applicants to the Board of Examiners is their personal time constraints. There are several variations of how this is a challenge, although the end result is a reduction in successful applicants and certificates being granted. The first variation is a lack of time to pursue the core courses because of family and/or work commitments. The second variation is beginning to pursue the core courses

and then stopping because of family and/or work commitments. The third variation is finishing the core courses, receiving a college or university certificate or diploma, and failing to fulfil the other BOE requirements (8 'other' credits, or the application process itself) because they are too time consuming.

It is possible to bring back the examination component of the Board of Examiners, one of the powers approved in the *Local Government Act*. Those local government employees who do not want to take the courses can take the challenge examination in a specific course to prove their knowledge of the content. Consultations would need to take place with the Local Government Educators Working Group to see if institutions would agree with this policy. The institutions could create a unique examination for each applicant and the cost would be borne by the applicant in lieu of taking the actual course.

Time constraints due to family and/or work

The biggest barrier to BOE applicants is their personal time constraint. Many respondents explain that after work they have familial obligations and responsibilities. Their free time is limited and there are higher priorities than the BOE certificate for many potential applicants. Solutions for time constraint could be managed through local government work policies.

Through negotiations with LGMA, other professional associations, and local governments, a new work policy could be created that provides time for study during regular work hours for students in local government courses. While the notion may seem like a long shot, it is worth the discussion, if only to discover how much emphasis each local government puts on professional development and flexibility for their employees. The rationale follows the main principles of the BOE and the LGMA, professional development and training equals a more capable and educated work force. The work policy would ensure that local government employees could take courses and fulfill course requirements during their regular working hours, because it is considered work related. This policy would also support a work/life balance policy since staff would have more time for their families after work.

This proposed policy is focused on distance courses offered by institutions. Local governments can already grant special leave, and even funding, for the week long MATI courses. This policy is a longer term extension of the special leave for education. This requires some long-view thinking, where short term workload issues are more than compensated by longer term capacity building in staff. If local governments already provide funding for courses, there could be an 'OR' clause. For example, an employee can receive funding for courses and work on their own time OR the employee pays for the course and receives study time at work in lieu of funding.

Examining current certificate requirements

Keep most of the current requirements, especially the four core courses, as per the consultation piece feedback, in order to keep the number of courses required to a minimum. It is possible to expand the Local Government Services in B.C. course into two parts, Service I and Service II. The majority of local government work is about

providing services and allotting enough study time to cover all facets of service is vital. During some of the focus groups it was felt that the Services courses was crammed full of information and topics were being covered too quickly because there is so much ground to cover. Expanding the course to two parts could provide sufficient coverage of the material.

There is value in adding Ethics as a core course, as explained previously. Furthermore, Communications could be added as a Core Course. So, the core four becomes the core six courses. To mitigate the addition of more requirements, the number of ‘other’ courses required can be reduced to six courses instead of eight.

Furthermore, remove some of the subject areas related to local government in “Policy 4” in order to increase the value of ‘other’ credit courses used for the certificates. For example, remove English, Mathematics, and other generic subject areas as potential credit courses, to put more emphasis on clearly applicable areas such as dispute resolution, planning, Aboriginal Studies or Parks and Recreation Administration.

Changes to the current required DPSM/DLGM courses

Following the principle of broadening the options for students and opening the field to other schools, remove the specific UVic DPSM/DLGM courses. In its place require two or three courses from skills and knowledge targeted for managers or specifically local government, such as those subject areas recommended in the consultation piece. This can include options such as the subject area of leadership, the MATI courses, urban planning, or other relevant areas. Almost all post-secondary institutions have options for a leadership certificate, or courses in leadership and management. Non-credit courses could also be accepted if they were credible enough, proven equivalent by the BOE, and linked to local government, i.e. sponsored through a noted institution, such as Simon Fraser University’s (SFU) Civic Engagement or urban planning programs, or the International Association for Public Participation’s (IAP2) Public Participation training. Acceptance of courses could be based on hours of learning, so a workshop alone would not be enough, although a week’s worth of workshops could qualify.

Work experience

There is an opportunity to create a 2-tiered certificate system. One of the reasons for the certificates, according to the 2004 BOE Discussion Paper, is the drive to get more potential local government employees into the system. The work experience requirement is a large barrier to receiving a certificate and excludes those people who are taking courses but not yet employed. One of the key areas identified in the 2004 report was of clear career paths and incentives to take more courses. There is no incentive to take further courses if a certificate can never be received because of a lack of work experience. An applicant should be recognized for professional development that goes beyond their current role and that looks towards a future career in local government management.

The 1st tier is for students or people striving for recruitment, education, or promotion. There would be two categories of Tier 1 certificates: Service Delivery and

Administration. Tier 1 would have the 'regular' educational requirements, but no required work experience. Tier 2 would be the 'standard' certificates, with all the educational requirements plus the work experience.

There can be extra requirements beyond the current 'standard' for Tier 2 certificates. Perhaps extra educational courses could be added to Tier 2. The 2-tier system should only be applied to the management certificates, unless the service delivery certificate changes dramatically, because it is still assumed that only current local government employees can take the necessary courses.

The 4 core courses are already tied to certificates issued by universities and colleges, except for NWCC which only offers the courses through an invitation process (to screen out non-local government employees and because the courses are offered more as a service than a post-secondary program). School certificates can be put on resumes to show initiative and interest. However, there will be have to be talks with the schools to make sure that non-local government employees can be allowed to take the courses. If this can happen, then the tiered system can be applied to all certificates.

Alternatively, instead of a tiered system, the BOE could provide a 'letter of endorsement' option for management certificate applicants who have the educational requirements for a certificate, but not the work experience. This way the applicant can show their initiative and commitment to their employer, apply for management positions, and then build up their work experience for the appropriate BOE certificate.

On the other side of the argument, feedback from the consultation strongly supports work experience as a component of BOE certification. Work experience is a measure of survival in local government. The certificate is partly an acknowledgement of the commitment of the recipient to local government. The BOE certificate, without the work experience component, would have less value because it would only be a duplication of the school's degree. There would be little point to the BOE piece of paper. The consultations revealed that the work experience component is considered integral to the BOE certificate, making the certificates more like an accreditation. Accreditation for local government employees would be a notable milestone in the creation of a body of recognized professionals.

With the consultation feedback in mind, another option that follows the established principles of inclusion rather than exclusion emerges. Create one more level of certificate below the Service Delivery Certificate. This certificate would be available to anyone who cannot fulfill the work experience component, such as provincial government employees, non-profit employees, students of local government, and other groups that have ties to local government but are not directly employed.

Code of Ethics

Because of the power in legislation, under the *Local Government Act*, to cancel a certificate on proof of dishonesty or gross negligence on the part of the holder, some measurement of 'dishonesty' and 'gross negligence' is required.

The legislation that grants the power to cancel a certificate on proof of dishonesty or gross negligence needs to have a definition or explanation of what constitutes gross negligence or dishonesty in the context of the BOE certificates and courses taken to fulfill certificate requirements. An ethics course component would ensure that all certificate holders know what ethics is in the context of local public service. A Code of Ethics for the BOE, which may just be LGMA's code, excluding references to being a member of LGMA and with their permission, would provide the framework for both cancelling certificates as well as providing a general Code of Ethics for all local government employees.

The argument for ethics in the BOE certificates is not new. There was a comment by Ken MacLeod, Director of Research, in May 1980 on the subject of *Regulation* changes, to possibly use the certificates as instruments to police a Code of Ethics, since under the old *Municipal Act* a certificate can be removed because of gross negligence. That comment is still relevant now.

Nationally, the provincial bodies who administer local government employee certificates are associations like the LGMA. They have the authority to create and give certificates to their members. All members are bound by their association's Code of Conduct. In B.C., local government employees may join the LGMA and theoretically are bound by their oath. The BOE certificates should have their own Code of Conduct.

It is possible to create or use an existing Ethics Code and tie it to the certificates, both through an educational requirement to learn about ethics, but also to apply it through an oath upon certification. The oath could be included on the certificate itself, and by accepting/signing the certificate, the owner accepts the oath. The application form for BOE certification could explain the Ethics oath and implications.

In a time of growing interdependence and global opportunity, a Code of Ethics could be beneficial for B.C. local government non-elected officials. Ethics could be included in all certificates, or at the very least all management certificates.

Lessons Learned from Other Jurisdictions

Most other provincial local government associations have a set program for their certificates. Five provinces have certification through the Dalhousie University/University of Alberta NACLAA program, which covers much of the same content as the BOE certificates. The NACLAA basic certificate has five required courses. The Local Government course is like a combination of the BC Services and UVic's ADMN 423 Local Government course, and there are finance and law courses. The two other required courses for their certificate are Public Administration Professionalism and Organizational Behaviour and Leadership. The former is like the Administration core course, but with a much stronger ethics component. The latter is a management and leadership course.

The NACLAA second level certificate has four more required courses, covering citizen engagement, a second course in law, organizational design and management and policy planning and program evaluation. The outline for the second course in law states it covers mostly land use, privacy information, and use of local government powers and their significance.

The NACLAA program is offered through the continuing education departments of the University of Alberta and Dalhousie University. Therefore it is a non-credit program, although it does have a strong set of accreditation agreements with eastern and central post-secondary institutions that have local government programs. This provides a strong argument that certain non-credit courses and programs should be acceptable for BOE certification. The non-credit rating does not necessarily mean the course or program is below post-secondary credit standards.

The other provinces who do not engage in the NACLAA program have their own certification process, either a set course list from their own association, a point system for educational background, or recognition of certain degrees. The B.C. system of accepting courses from multiple institutions appears more flexible than many other certificate systems. The point system, like that used by IIMC, could also offer increased flexibility. However, that would require a major overhaul of the current certificates and would go against the principles established for this report.

A similarity amongst the other provinces is that the certificates are administered through an association. Another similarity is that each association has their own code of ethics, and to receive a certificate the applicants must be a member of the association and therefore adhere to their code of ethics. This adherence to a code of ethics is a missing element in the B.C. BOE certificates.

General Topics of Discussion

Re-certification

Extend to all certificates the need to re-certify every few years, in order to maintain or encourage the maintenance of a local government employee's knowledge base. The re-certification process could be every 3, 5 or 10 years for all manager certificates. The current professional development option is only for the Executive Management certificate and it is voluntary. It is based on a three year point system. While the system is a little convoluted, the point system could be simplified and extended to all certificates. Work experience is not required, just proving current employment would be enough. Courses, seminars, workshops, could all add points, like the Saskatchewan or IIMC systems.

Re-certification is one method to encourage continual professional development. However, there are two factors against it for the B.C. BOE. First, because time constraints are an issue for applicants, there likely will not be a high turnover for re-certification. Second, the BOE program is operated by a single administrator and one assistant. The amount of paperwork to track mandatory re-certification is beyond their resources.

Nevertheless, re-certification should be kept as a voluntary option in the *Regulation*. There is no harm in its inclusion, and it could be used more often with increased promotion if simplified. The question then becomes how to re-certify. An idea is to include an option to re-certify every 3-5 years on a voluntary basis. This option can be included in the *Regulation* or in a policy and applicable to every certificate. The professional development proof for re-certification would be simpler than the current system. A simple option is that an applicant for voluntary re-certification need only show proof that they are actively working on their professional development. No point system is required, just examples of earnest behaviour through training, education, volunteer activities, and so on. The BOE could make judgements based on the spirit of re-certification rather than a hard system of points. There could be an essay component on why an applicant believes they should be re-certified.

Re-certification would grant a new seal, perhaps in a different colour and clearly identifying how many years of re-certification have been achieved. The seal could be applied to the original certificate. Accompanying the seal could be a letter of endorsement, and a notice sent to local media and elected officials. This would be good for public relations of the local government, when elected officials, the media and the public are reminded of the professional development of their city employees.

Promotion of the BOE

A topic of note in the focus groups and from the survey results is the visibility of the Board of Examiners certificates. While 87% of survey respondents said they were aware of the BOE, judging from the comments many were not familiar with the details or the purpose of the certificates. Only 15% of employers believed that the BOE certificate was important and only 12% had the certificate as a requirement for job postings. The certificates are an asset and provide a standard of local government education that local government employers should put more faith in. Therefore the Board of Examiners needs to promote the certificates vigorously in concert with its partners to improve the visibility, durability and reputation of the certificates.

- Create MOUs with post-secondary institutions to include the BOE certificates in lectures and discussions, syllabi, school announcements, poster space, etc
- Increase promotion at LGMA events and conferences
- Research, publish and circulate a list of local governments that actively require a BOE certificate for job postings
- Research, publish and circulate a list of local governments that recognize the BOE certificate as an asset for job postings
- Create clear application and equivalency guidelines
- Attend local government events and conferences to promote the program

Allowing Use of Non-Credit Courses for the 'Other' Credit Courses

There are valuable non-credit courses available at colleges, universities and other educational or private institutions that could be allowed for use in applying for BOE certification (CivicInfo BC, 2010). These non-credit courses could count towards the

'other' required courses. The *Regulation* could be changed to allow certain non-credit courses to be used for the certificates. A running list of acceptable non-credit courses, based on set criteria by the Board such as proof of assignments and grades, would need to be created and updated regularly. The criteria for acceptable non-credit courses would ensure that the standards for the certificates remain high when compared to the credit courses.

Transferability of courses between institutions

A discussion could be encouraged to take place between institutions to make accreditation agreements between certain institutions in order to smooth the implementation of some certificate changes put into effect. For example, if more core courses are added to all certificates, yet some institutions lack the capacity to offer the new courses, an agreement can be made between two institutions to allow students to take some courses at the smaller school and be able to take the other courses at another school, yet be given credit for the other courses through the smaller school in order to get the smaller school's degree. In essence this would allow schools with smaller capacity to continue to offer local government courses and programs to their clientele. Acknowledgment that one institution is aiding another should be public and transparent.

Examinations

There is the possibility, through the *Local Government Act* s.205(1)(c), to create a final exam for certificate holders, to test if they indeed have the required skills and knowledge after taking the courses. This was the tradition at the beginning of the BOE program when the courses were run through UBC, and it would potentially increase the value of the certificates by establishing a new modern standard. However, there would be numerous issues with the idea, such as exam administration, drafting the exams, grading, costs, and applicant backlash over another major requirement.

Alternatively, there is the option of being able to take a final examination in lieu of taking a course, paying half or all the course fee, and gaining credit for the purposes of BOE certification if passed. This is on par with prior learning assessments, where skill and knowledge is weighed against course material to see if course credit can be awarded. The institution offering the relevant course could administer and grade the test, as well as receive the course fees. This would be a resource intensive process, similar to the PLA.

Finally, there is the possibility of making the BOE certificates have independent value beyond post-secondary institutions. This option would create an independent examination for all applicants. Essentially, the current BOE model would be dismissed and the only method of evaluation would be with examinations. The Board, instead of recognizing credentials, would only go over exam results and award certificates through applicants successfully passing the exam(s). While this idea goes against the principles established for this discussion, it is an interesting idea to create a different standard above and beyond post-secondary institutions through an independent examination process.

A cohesive body for local government programs

Currently five schools in BC offer the four core courses for BOE certificates, and UVic has diplomas that are equivalent to the first four core courses. It would be beneficial to have one overseeing body coordinate all the local government courses and options, with the consensus of all the stakeholders. In essence, create a new 'Local Government Educational Authority' that ensures that each school maintains the same standards in courses, has the capacity to offer required courses, and authority to make changes where necessary. The Authority could also fill the gaps of offered courses from certain schools by coordinating schedules of when each course is offered. This would maintain a steady source of available courses for students in local government. Each school would continue to offer their own programs, with their own incentives and requirements. The Board of such a body could be composed of program administrators from each BC School. There already exists an informal body of educators, the Educators Working Group, which meets to discuss issues concerning local government courses. Alternatively, the Board could consist of neutral members who maintain communications with each school. Suggestions for membership could come from the LGMA, UBCM, BOE, Ministry of Advanced Education, individual local governments, and consultants.

Increase in scholarship awards

The survey confirmed that costs are sometimes a barrier to certification. Scholarships, while available, are limited and applicants would enjoy an increase in awarded scholarships. The focus groups also praised the scholarship program because it eased the financial burden on smaller local governments who pay for their employees training, as well as for individual applicants who pay the course costs themselves. An increase in scholarship funding is warranted.

Funding for local government professional development is in line with provincial government objectives in making local government more independent and autonomous. Providing capacity to local government by making them more knowledgeable about how government's interact, amongst other things, would improve efficiency, increase the use of relevant grants and programs, it would reduce paperwork, questions/confusion, and conflicts. It is an investment that would have strong returns for provincial government departments.

There could be a fund for the purpose of local government education. Every local government invests a small amount each year with funds matched by provincial government ministries (such as the Ministry of Finance, CSCD, and Advanced Education). Other sources of funding could be post-secondary institutions, the Municipal Financial Authority (MFA), and other associations with ties and/or a stake in local governments. The portion of local government revenue for the fund could be related to the size of their work force.

Further rewards beyond certification

Should there be more rewards beyond the certification for local government employees who pursue professional development? Trained staff who have taken the courses to receive the certificate are better equipped with skills and knowledge to aid their

community. Local governments who encourage their staff to pursue the BOE certificates should be rewarded. Special grant funding of \$10,000 annually if staff is engaged in professional development would be a strong encouragement. The cost of funding could be saved in efficiency of service, improved relations with the public and other levels of government, and a sharing of ideas through classes and networking. The special grant funding could have criteria that it must be used for further professional development.

Mandatory Certification

The BOE could work towards a mandatory requirement for the certification of local government managers through the Board of Examiners. Extensive stakeholder consultation should be undertaken for this option to be viable. Full support from the LGMA, UBCM, and post-secondary institutes would be required to advance this idea any further. LGMA and its members would have to support the mandatory educational requirements and costs imposed on local government employees. UBCM would have to support the provincial imposition of the certificates on local government staff, which goes against the usual hands-off approach of the provincial government. The post-secondary institutes would have to have the capacity to support the increased number of students. However, the mandatory certificate could build towards a professional accreditation for local government professionals. Moreover, the mandatory certificate would allow the creation of a competency framework that connects the technical skills and knowledge of local government to municipal human resource systems.

There is precedent for mandatory certification that strengthens this argument. The B.C Board of Examiners *Regulation* from 1958 until 1982 included mandatory certification for municipal officers. Furthermore, in current practice, *The Municipalities Act* in Saskatchewan requires that every rural and urban administrator must be qualified according to their respective associations.

Creating a BOE Competency Model

Pursuing this path could break the principle of keeping the certificates simple. The model, in the end, would have to be easy to understand and follow, and local government employees would need to see the benefit of having such a model. While it is possible to create a competency model for the certificates, it would require a total overhaul of the BOE framework, along with other major changes and impacts for stakeholders involved.

To be valid, and to avoid generic (and perhaps invalid) competencies, a major consultation project would need to be done. Local government employees, from all levels of work (unless it was limited to management) and from all sizes of local governments, would need to be consulted. This would likely be done through questionnaires, because it is the easiest format to reach such a large population. However, a second data collection method would be required to support the competencies selected. Focus groups and interviews would be a challenge to implement due to the number of local government employees.

Once gathered the individual competencies would be put into clusters of related competencies and graded into levels of performance. These levels would show the

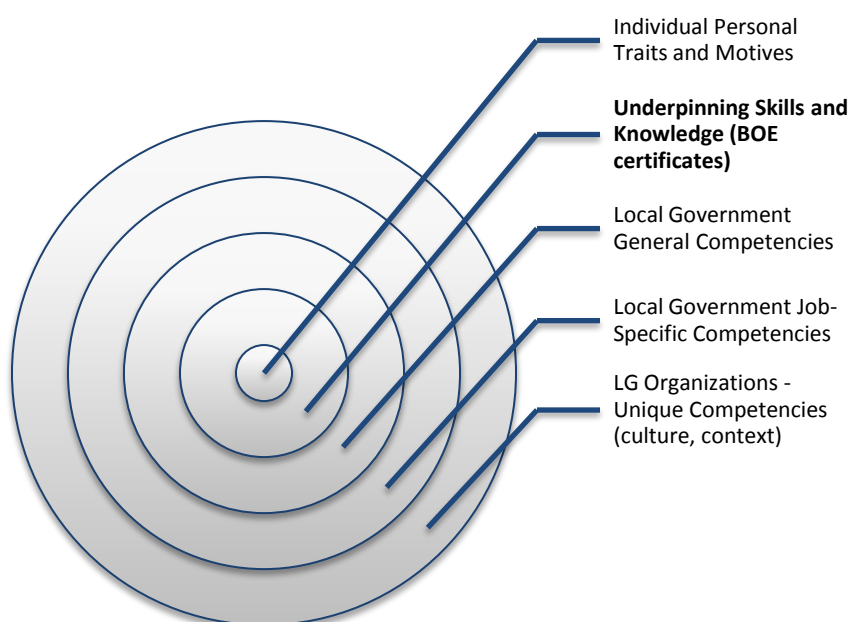
distinction between general employees, managers, and senior managers' knowledge and skills required for local government performance.

According to the literature, competency models should be tied to human resource systems. The models should relate skills, and knowledge (and performance) to pay, promotion, performance evaluation, recruitment, and rewards. This will not be possible unless the certificates become mandatory for all local government employees. If the competency model is only used with the current BOE framework, that is voluntary participation, it loses much of its power and validity.

Only the choice of moving towards a mandatory certificate elicits a response to make a competency framework for the Board of Examiners. Otherwise there is no strong argument for a framework, as there is no direct link to local government human resource systems. The competency framework would essentially be limited to technical skills, with behaviours excluded as inappropriate. If a competency model is pursued for the BOE, a lengthy investigation and data collection is required to find and categorize the relevant competencies necessary for a valid framework.

Mandatory certification would justify the creation of a competency model that, while not including certain competencies out of scope for the BOE, such as personality, motivation, and attitudes, would include technical and functional competencies. The BOE competency model can link with local government human resource systems by providing one foundational component of a larger competency framework. Figure 5 shows the role of the Board of Examiners certificates in a local government competency framework.

Figure 5 - Role of the BOE in a Local Government Competency Framework



The BOE competency model could also stand alone by providing just the functional (skills and knowledge) competencies required for local government work.

Linking with other competency models

The City of Victoria already has an “Exempt Staff Competency Framework” which covers behaviours for success (City of Victoria, 2009). However, it does not include specific local government knowledge or skills. There is the possibility of creating a connection between the two models. This connection between models can extend across the province, should other local governments choose to create their own competency model.

The City of Victoria framework is for exempt staff only (i.e. salaried staff), who are usually managers. The latter three BOE certificates for managers, and their associated competency framework, could be tied to the existing City of Victoria framework by providing the functional competencies required in a local government workplace.

Conclusion

The discussion section took the research from the background section, the literature review, the jurisdiction scan and the consultation findings, and attempted to weave a narrative of changes that could improve upon the current BOE program. The changes were guided by seven objectives and principles inspired by the report’s original challenges and the principles of the 2004 review of the pre-2005 BOE *Regulation*. The topics discussed provide the impetus for the recommendations in the next section.

RECOMMENDATIONS

This report's 19 recommendations for the BOE program have been formed around the objectives and principles as presented at the beginning of the Discussion section. The recommendations are divided into three sections: short term actions, medium term actions, and long term considerations. Each recommendation is not necessarily mutually exclusive but they are presented individually for the Board of Examiners to consider on their own merit.

Short Term Actions

Recommendation 1 - Maintain consistency in the basic certificate structure

Keep the same certificate titles and the number of total required courses. No reduction of the first four core courses.

Recommendation 2 - Increase promotion of the BOE

The Board of Examiners needs to promote the certificates vigorously in concert with its partners to improve their visibility, durability and reputation.

Recommendation 3 - Continue Scholarship Awards

Recommendation 4 – Negotiate a Study at Work Policy

LGMA would negotiate with UBCM and local governments to create a policy regarding the provision of study time for local government courses during regular work hours, whether this is attending in-class courses, studying for distance courses or other options.

Recommendation 5 – Add an Ethics Component to One or More Existing Course(s)

- Add an Ethics component to all the BOE certificates by negotiating with post-secondary institutions to integrate the ethics component in a current core course, such as Administration or Law.
- Create a connection between the certificate awarded and a Code of Ethics. Options include creating a new Code for the BOE certificates specifically, or using an existing Code, such as the LGMA Code.

Recommendation 6 – Remove Redundant Core Course 9 and Add Courses in Demand

In conjunction with Recommendation 5, remove University of Victoria's ADMN 422 Ethical Public Management from the Certificate in Executive Management requirements and replace it with a Conflict Resolution and Mediation course or reduce the Executive Management core course requirements by one course.

Recommendation 7 – Remove References to Specific Institutions in Policy 1

Remove the specific references to University of Victoria courses from Policy 1 and replace them with generic titles like the first four core courses.

Recommendation 8 – Create and Maintain a List of Equivalencies for DPSM/DLGM courses

- The BOE should create and maintain upkeep of a list of equivalent courses for the required Diploma in Public Sector Management / Diploma in Local Government Management courses
- Post the list on the BOE website for applicants to reference
- The list of equivalencies would only be valid for BOE certification. They could not be used for official institutional transfers.

Recommendation 9 – Remove Redundant Core Course 7 and Add Courses in Demand

- Use the BOE *Regulation* Definitions section for “core courses” to alter core courses that are redundant and add new core courses that are desired
- Remove the second Law component, ADMN 452 Local Government Law (Core Course 7) from Policy 1. It is currently redundant with Local Government Law in British Columbia (Core Course 4)
- Replace Core Course 7 with a course in Communications

Medium Term Actions

Recommendation 10 – Add an Ethics Component through an Additional Core Course

Add an Ethics component to all the BOE certificates by creating an additional core course, increasing the core four courses to five courses. Reduce the number of ‘other’ credit courses needed by one. The five core courses would be:

- Administration
- Services
- Finance
- Law
- Ethics / Ethical Public Management

Recommendation 11 – Allow the Use of Approved Non-Credit Courses for ‘Other’ Courses

- Approved non-credit courses would count towards the ‘other’ required courses, or core courses if deemed equivalent by the Board.
- The BOE Administrator would create and maintain a list of acceptable non-credit courses.
- Post the list on the BOE website for public view

Recommendation 12 – Remove References to UVic DPSM/DLGM Courses

- Remove reference to University of Victoria’s DPSM/DLGM required courses from the BOE *Regulation*.
- Replace with required course credits in local government? Leadership and Management.
- The BOE Administrator should create and maintain a list of acceptable courses currently offered in Leadership and Management from BC post-secondary

institutions. The courses can be solicited from post-secondary institutions or built on a case-by-case basis through certificate applications

- Post the list on the BOE website for public view

Recommendation 13 – Remove Redundant Course 5 and Add Courses in Demand

Following Recommendation 12, remove Core Course 5 (ADMN 312 Managing in Public and Non-Profit Organizations) from all the management certificates and replace with a course in Project Management and Strategic Planning.

Recommendation 14 – Additional Core Courses for all Certificates

Include additional core courses to the certificates, while maintaining the current number of total course credits required, and remove all institution specific courses. The breakdown of each certificate would be as follows:

Certificate in Local Government Service Delivery

| |
|--|
| Core 1 = Local Government Administration |
| Core 2 = Local Government Service I |
| Core 3 = Local Government Services II |
| Core 4 = Local Government Law |
| Core 5 = Local Government Finance |
| Core 6 = Communications |
| Core 7 = Ethics |
| 5 'other' courses |

[12 courses in total, like the current certificate]

Certificate in Local Government Administration / Statutory Administration

| |
|--|
| Core 1-7 |
| Core 8 = Project Management and Strategic Planning |
| Core 9 = Public Sector Economics |
| Core 10 = Local Government Policy |
| Core 11 = Case Law and Labour Law |
| 2 course credits in Leadership and Management |
| 5 'other' courses |

[18 courses in total, like the current certificate]

Certificate in Local Government Executive Management

| |
|---|
| Core 1-11 |
| Core 12 = Conflict Resolution and Mediation |
| Core 13 = Directed Studies |
| 3 course credits in Leadership and Management |
| 6 'other' courses |

[22 courses in total, like the current certificate]

Long Term Considerations

Recommendation 15 – Create a Basic Certificate in Local Government

This certificate would be available for applicants outside of local government that have interest or ties to local government, such as non-profit employees, provincial employees, First Nation government employees or students in local government. Local government employees would not be able to apply for this certificate. The educational requirements are the same as the Service Delivery certificate. A work experience requirement would not be included.

Recommendation 16 - Re-Certification / Professional Development Endorsement

Include an option to re-certify every 3-5 years on a voluntary basis. This option can be included in a policy and applicable to every certificate.

Recommendation 17 - Increase Number of Scholarships Awarded

Start a pooling fund for the purpose of local government education. Every participating local government invests a portion of their revenue with a percentage of funds matched by provincial government ministries and other stakeholders in local government education.

Recommendation 18 – Examination as Equivalency

Create an examination for each core course. Applicants who want to appeal a decision that courses they took are equivalent may take the exam. Successfully passing the exam grants equivalency for a core course for the purposes of BOE certification.

Recommendation 19 – Mandatory Certification for Local Government Managers

- The BOE could work towards a mandatory requirement for the certification of local government managers through the Board of Examiners
- The mandatory certificate can build towards a professional accreditation for local government professionals
- The mandatory certificate would allow the creation of a competency framework that connects the technical skills and knowledge of local government to municipal human resource systems

CONCLUSION

A review of the BOE program was set in motion through client feedback. The initial challenges of course equivalency, course availability and school accessibility were confirmed in the report, and a major new challenge of time constraints was discovered through the consultation piece.

The findings and recommendations in this report will stimulate the review process into the BOE program by the Board of Examiners. By consulting with the primary stakeholders, researching the subject of competency, investigating the approaches of other jurisdictions, and looking back at what the Board had already done, the goal of this report has been to provide the BOE with advice on ways to move forward. Despite having dismissed the use of competencies under the current BOE framework and mandate, the literature review was valuable in exploring a possible avenue for change.

Using the recommendations in the report, the BOE can move forward with a review of the *Regulation* and the BOE program. However the Board decides to act, further consultation will be required with all the stakeholders and partners in order to gain mutual consent and cooperation.

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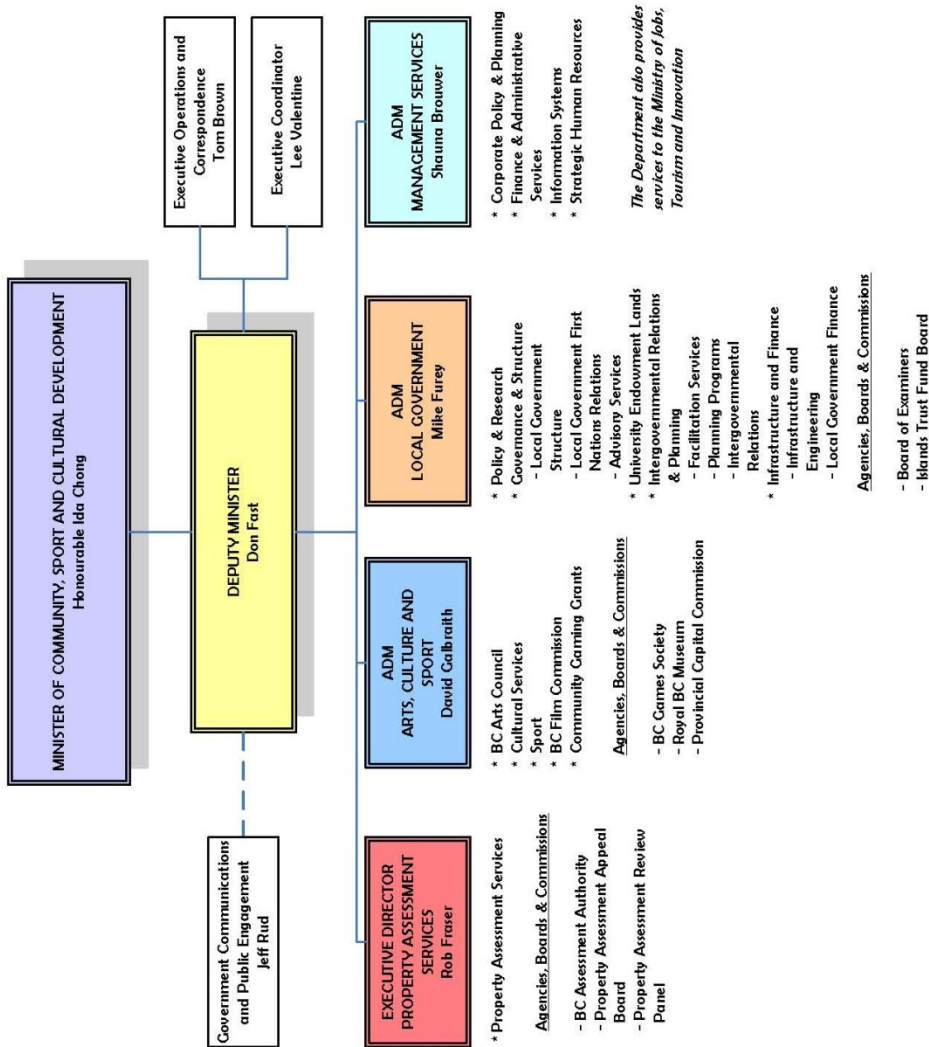
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APPENDICES

Appendix A
 Ministry of Community, Sport & Cultural Development

MINISTRY OF COMMUNITY, SPORT AND CULTURAL DEVELOPMENT



Appendix B
Local Government Employees Certification Regulation and Policies



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IMPORTANT INFORMATION

B.C. Reg. 324/2005

Deposited November 1, 2005

Board of Examiners and O.C. 532/2005

effective December 31, 2005

Local Government Act
LOCAL GOVERNMENT EMPLOYEES CERTIFICATION REGULATION

Contents

- 1 Definitions
- 2 Certificate in local government service delivery
- 3 Certificate in local government administration
- 4 Certificate in local government statutory administration
- 5 Certificate in local government executive management
- 6 Professional development endorsement
- 7 Board of examiners may require additional presentation for granting of certificate
- 8 Transition

Definitions

1 In this *Regulation*:

"board of examiners" means the Board of Examiners established under Division 3 of Part 5.1 of the *Local Government Act*;

"chief administrative officer" means

(a) a chief administrative officer within the meaning of the *Community Charter*,

(b) a chief administrative officer within the meaning of the *Local Government Act*, or

(c) an officer position established for the City of Vancouver with powers, duties and functions that include the matters referred to in section 147 (a), (b) and (c) of the *Community Charter*[*officer positions*];

"core courses" means credit courses, recognized by the board of examiners for the purpose of granting certificates under this *Regulation*, in one or more of the following subject areas:

- (a) local government administration;
- (b) local government services;
- (c) local government finance;
- (d) local government law;
- (e) local government policy;
- (f) urban and regional economics;
- (g) public sector management;

"corporate officer" means

- (a) a corporate officer within the meaning of the *Community Charter*,
- (b) a corporate officer within the meaning of the *Local Government Act*, or
- (c) an officer assigned responsibility for corporate administration in an improvement district under section 738.2 of the *Local Government Act*[*corporate administration*];

"credit course" means a course that is recognized by

- (a) a university, college or other institution established under
 - (i) the *College and Institute Act*,
 - (ii) the *University Act*, or
 - (iii) an Act establishing a named college or university, or
- (b) a university or college established under an Act of another province as fulfilling a requirement for successfully completing a course of studies for credit at the university, college or other institution;

"equivalent experience in another jurisdiction" means employment that is

- (a) in a jurisdiction recognized by the board of examiners, and
- (b) deemed to be equivalent to employment in local government in British Columbia in accordance with the formula, criteria and process established by the board of examiners;

"financial officer" means

- (a) a financial officer within the meaning of the *Community Charter*,
- (b) a financial officer within the meaning of the *Local Government Act*, or
- (c) an officer assigned responsibility for financial administration in an improvement district under section 738.3 of the *Local Government Act*[*financial administration*];

"managerial experience" means employment that includes responsibility

- (a) to supervise, train, and evaluate the performance of employees, and
- (b) to develop and implement a budget.

Certificate in local government service delivery

2 The board of examiners may grant a Certificate in Local Government Service Delivery to a person who has all of the following qualifications:

- (a) has successfully completed
 - (i) the 4 core courses recognized by the board of examiners for this certificate, or
 - (ii) credit courses that, in the opinion of the board of examiners, are the equivalent of the courses referred to in subparagraph (i);
- (b) in addition to the core courses referred to in paragraph (a), has successfully completed 8 credit courses in subject areas related to the operation of local government as determined by the board of examiners;
- (c) either
 - (i) has completed at least 36 months of employment with a municipality, regional district or improvement district situated in British Columbia, or
 - (ii) has completed at least 24 months of employment with a municipality, regional district or improvement district situated in British Columbia and has at least 12 months of equivalent experience in another jurisdiction.

Certificate in local government administration

3 The board of examiners may grant a Certificate in Local Government Administration to a person who has all of the following qualifications:

- (a) has successfully completed
 - (i) the 8 core courses recognized by the board of examiners for this certificate, or
 - (ii) credit courses that, in the opinion of the board of examiners, are the equivalent of the courses referred to in subparagraph (i);
- (b) in addition to the core courses referred to in paragraph (a), has successfully completed
 - (i) 2 credit courses from the Diploma in Public Sector Management Program or the Diploma in Local Government Management Program at the University of Victoria, or
 - (ii) 2 credit courses that, in the opinion of the board of examiners, are the equivalent of the courses referred to in subparagraph (i);
- (c) in addition to the core courses referred to in paragraph (a) and the credit courses referred to in paragraph (b), has successfully completed 8

credit courses in subjects related to the operation of local government as determined by the board of examiners;

(d) either

(i) has completed at least 48 months of managerial experience with a municipality, regional district or improvement district situated in British Columbia, or

(ii) has completed at least 24 months of managerial experience with a municipality, regional district or improvement district situated in British Columbia and has at least 24 months of equivalent experience in another jurisdiction.

Certificate in local government statutory administration

4 The board of examiners may grant a Certificate in Local Government Statutory Administration to a person who has all of the following qualifications:

(a) has successfully completed

(i) the 8 core courses recognized by the board of examiners for this certificate, or

(ii) credit courses that, in the opinion of the board of examiners, are the equivalent of the courses referred to in subparagraph (i);

(b) in addition to the core courses referred to in paragraph (a), has successfully completed

(i) 2 credit courses from the Diploma in Public Sector Management Program or the Diploma in Local Government Management Program at the University of Victoria, or

(ii) 2 credit courses that in the opinion of the board of examiners are the equivalent of the courses referred to in subparagraph (i);

(c) in addition to the core courses referred to in paragraph (a) and the credit courses referred to in paragraph (b), has successfully completed 8 credit courses in subjects related to the operation of local government as determined by the board of examiners;

(d) either

(i) has completed at least 48 months of employment with a municipality, regional district or improvement district situated in British Columbia

(A) as corporate officer, or as deputy to that officer,
or

(B) as financial officer, or as deputy to that officer,
or

(ii) has completed at least 36 months of employment with a municipality, regional district or improvement district situated in British Columbia

(A) as corporate officer, or as deputy to that officer,
or

(B) as financial officer, or as deputy to that officer,

and has at least 12 months of equivalent experience in another jurisdiction.

Certificate in local government executive management

5 The board of examiners may grant a Certificate in Local Government Executive Management to a person who has all of the following qualifications:

- (a) has successfully completed
 - (i) the 9 core courses recognized by the board of examiners for this certificate, or
 - (ii) credit courses that, in the opinion of the board of examiners, are the equivalent of the courses referred to in subparagraph (i);
- (b) in addition to the core courses referred to in paragraph (a), has successfully completed
 - (i) 3 credit courses from the Diploma in Public Sector Management Program or the Diploma in Local Government Management Program at the University of Victoria, or
 - (ii) 3 credit courses that, in the opinion of the board of examiners, are the equivalent of the courses referred to in subparagraph (i);
- (c) in addition to the core courses referred to in paragraph (a) and the credit courses referred to in paragraph (b), has successfully completed 10 credit courses in subjects related to the operation of local government as determined by the board of examiners;
- (d) has completed at least 48 months of employment with a municipality or regional district situated in British Columbia and has served at least 24 of the 48 months of that employment
 - (i) as chief administrative officer, or
 - (ii) as deputy to a chief administrative officer;
- (e) has completed, to the satisfaction of the board of examiners, an oral and written presentation to the board of examiners on a topic related to local government administration.

Professional development endorsement

6 The board of examiners may grant a professional development endorsement to a person who

- (a) has been granted a certificate in Local Government Executive Management,
- (b) has undertaken professional development activities totalling 100 credit units over a period of 3 years, determined in accordance with the formula, criteria and process established by the board of examiners, and
- (c) is recommended for a professional development endorsement by the Local Government Management Association.

Board of examiners may require additional presentation for granting of certificate

7 (1) If a person meets the requirements for a certificate under sections 2 to 4, but the board of examiners considers the person's work experience is nevertheless inadequate, the board of examiners may require the person to complete an oral and written presentation to the board of examiners on a topic related to local government administration.

(2) If the presentation referred to in subsection (1) is not to the satisfaction of the board of examiners, it may refuse to grant the applied-for certificate.

(3) On the request of the person referred to in subsection (1), the board of examiners must give written reasons for its decision to require a presentation under subsection (1), or its refusal to grant a certificate under subsection (2).

Transition

8 (1) Until December 31, 2007, the Local Government Officer's Certification *Regulation*, B.C. Reg 83/90, as it existed immediately before the coming into force of this *Regulation*, applies to a person referred to in subsection (2).

(2) Subsection (1) applies to a person, who, at any time before the coming into force of this *Regulation*, was enrolled in, or completed, a course of studies leading to a membership, degree, diploma or designation referred to in sections 2, 3, 4 or 5 of the Local Government Officer's Certification *Regulation* as it existed immediately before the coming into force of this *Regulation*.

Note: this Regulation repeals B.C. Reg. 83/90.

[Provisions of the *Local Government Act*, R.S.B.C. 1996, c. 323, relevant to the enactment of this *Regulation*: section 206]



Policy 1 Core Courses Mandatory For Certification
Local Government Employees Certification Regulation

Certificate in Local Government Service Delivery

Section 2(a)(i): The 4 core courses recognized by the Board are:

1. Local Government Administration in British Columbia
2. Local Government Services in British Columbia
3. Local Government Finance in British Columbia
4. Local Government Law in British Columbia

The courses named above are presently offered by Camosun College, Capilano University, College of the Rockies, Northwest Community College and the University of Northern British Columbia. Equivalent courses may be offered at other Colleges and Universities in British Columbia and may be recognized by the Board *.

Certificate in Local Government Administration and the Certificate in Local Government Statutory Administration

Section 3(a)(i) and Section 4(a)(i): The 8 core courses recognized by the Board are:

1. Local Government Administration in British Columbia
2. Local Government Services in British Columbia
3. Local Government Finance in British Columbia
4. Local Government Law in British Columbia

Courses 1 through 4 are presently offered by Camosun College, Capilano University, College of the Rockies, Northwest Community College and the University of Northern British Columbia. Equivalent courses may be offered at other Colleges and Universities in British Columbia and may be recognized by the Board *.

5. Managing in Public and Non-Profit Organizations (ADMN 312)
6. Urban and Regional Economics (ADMN 445)
7. Local Government Law (ADMN 452)
8. Local Government Policy (ADMN 465)

Courses 5 through 8 are presently offered by the University of Victoria. Equivalent courses may be offered at other institutions and may be recognized by the Board *.

Certificate in Local Government Executive Management

Section 5(a)(i): The 9 core courses recognized by the Board are:

1. Local Government Administration in British Columbia
2. Local Government Services in British Columbia
3. Local Government Finance in British Columbia
4. Local Government Law in British Columbia

Courses 1 through 4 are presently offered by Camosun College, Capilano University, College of the Rockies, Northwest Community College and the University of Northern British Columbia. Equivalent courses may be offered at other Colleges and Universities in British Columbia and may be recognized by the Board *.

5. Managing in Public and NON-Profit Organizations (ADMN 312)
6. Urban and Regional Economics (ADMN 445)
7. Local Government Law (ADMN 452)
8. Local Government Policy (ADMN 465)
9. Ethical Public Management (ADMN 422)

Courses 5 through 9 are presently offered by the University of Victoria. Equivalent courses may be offered at other institutions and may be recognized by the Board *.

** Core course equivalency will be determined by the Board and may include consultation with its educational partners. Applicants are advised to contact the Administrator, Board of Examiners, for details regarding the process for equivalencies.*

NOTES:

- i. A person who possesses a Diploma in Local Government Management, a Diploma in Public Sector Management (that includes the four [4] Local Government option courses) or a Master's in Public Administration from the University of Victoria is considered by the Board to have taken credit courses that are equivalent to the initial four courses that form the basis of all certificates.
- ii. A person who possesses an existing credit in the Local Government Law course (ADMN 452) from the University of Victoria is considered by the Board to have taken the equivalent Local Government Law in British Columbia credit course.
- iii. A person who possesses an existing credit in the Local Government in British Columbia course (ADMN 423) from the University of Victoria is considered by the Board to have taken the equivalent Local Government Services in British Columbia credit course.
- iv. A person who possesses an existing credit in the Local Government Financial Management course (ADMN 448) from the University of Victoria is considered by the Board to have taken the equivalent Local Government Finances in British Columbia credit course.
- v. A person who possesses an existing credit in the Local Government Policy Skills course (PADM 305) from Capilano University is considered by the Board to be equivalent to University of Victoria's ADMN 465 Local Government Policy course, for purposes of certification by the Board.
- vi. A person who possesses any one of the following academic credentials is considered by the Board to have taken the equivalent Managing in Public and Non-Profit Organizations (ADMN 312) credit course at the University of Victoria: Bachelor of Business Administration, Bachelor of Commerce, Master's of Business Administration, University of Victoria Master's in Public Administration.



Policy 2 Equivalent Experience In Another Jurisdiction
Local Government Employees Certification Regulation

Jurisdictions recognized by the Board:

- Provincial Government of British Columbia
- Provincial Government – Canadian
- Territorial Government – Canadian
- Aboriginal Government in British Columbia
- Federal Government – Canada
- Local Government - other provinces and territories in Canada
- School District – British Columbia

Work experience equivalency is determined using a formula that deems twelve (12) months employment* in another jurisdiction to be an amount of experience that is equivalent to employment in local government in British Columbia.

The following table establishes the formula:

| 12 months employment* with recognized jurisdictions | Equivalent experience in British Columbia |
|--|--|
| Provincial Government of British Columbia | 5 months |
| Provincial Government – Canadian | 4 months |
| Territorial Government – Canadian | 4 months |
| Aboriginal Government in British Columbia | 6 months |
| Federal Government – Canada | 4 months |
| Local Government – other provinces and territories in Canada | 8 months |
| Statutory Officer in a School District in British Columbia | 6 months |

Examples of applying the formula:

1. An individual who had worked for 12 months in the Ontario Provincial Government would be deemed to have 4 months of equivalent work experience.
2. An individual who had worked for 24 months in the Federal Government, 12 months in the Manitoba Provincial Government, and 6 months in the Yukon Territorial Government would be deemed to have 14 months of equivalent experience calculated as follows:

| | | |
|---------------------------------|---|--------------------------------|
| 24 months Federal Government | = | 8 months equivalent experience |
| 12 months Manitoba Government | = | 4 months equivalent experience |
| 6 months Territorial Government | = | 2 months equivalent experience |

NOTES:

- vii. Individuals seeking equivalency are required to submit to the Board documentation confirming employment in a recognized jurisdiction.
- viii. The Certificate in Local Government Administration requires employment to be managerial experience in accordance with Section 3(d)(i) of the *Regulation*.
- ix. The Certificate in Local Government Statutory Administration requires employment to be as a corporate officer, or as deputy to that officer; or as a financial officer, or as deputy to that officer, in accordance with Section 4(d)(i)(A and B) of the *Regulation*.
- x. This policy does not limit the Board's authority under its *Regulation* to consider applications on a case by case basis.

**Policy 3 Professional Development Endorsement
Local Government Employees Certification Regulation**

A holder of a Certificate in Local Government Executive Management who completes at least 100 credits of professional development every three years, **subsequent to receiving the certificate**, may have recognition of this fact made in the form of an endorsement to the certificate upon proof of such professional development being made to the Board in accordance with this policy and upon a letter of endorsement being provided by the Local Government Management Association (LGMA).

How the Program works

The annual reporting period runs from January 1st to December 31st. All credits earned within that period are to be filed with the Local Government Management Association, no later than March 31st of the following year.

Certificate holders who wish to receive a professional development endorsement are required to report to the Local Government Management Association annually in the form attached hereto as Appendix A; a Nil report must be filed if no credits were earned that year. Upon verification by the LGMA that all reported credits have been earned, a letter will be issued to the Board of Examiners recommending that a professional development endorsement be granted and providing the Board with evidence of fulfillment of the requirements herein.

Certificate holders are required to earn 100 credits in each three year period on a moving total basis. An example of the three year moving total:

| | | | | |
|--------------|-------------------|--------|--------------|------------------|
| 2005: | 75 credits | | 2005: | 75 credits |
| 2006: | 20 credits | versus | 2006: | 20 credits |
| <u>2007:</u> | <u>20 credits</u> | | 2007: | 20 credits |
| TOTAL = | 115 credits | | <u>2008:</u> | <u>0 credits</u> |
| | | | TOTAL = | 40 credits |

Qualifying Activities

Local government officials are engaged in a wide variety of activities as part of their careers. As a result, their professional development activities will also be very diverse.

For that reason, the topics that qualify for credit towards re-certification of a Certificate in Local Government Executive Management are varied.

The credit granting policy is divided into four main areas:

SCHEDULE A includes the certificate holder's attendance at seminars, in house training, night school and university courses, special interest study groups and correspondence and self study courses. Credits are not given for overall attendance at trade shows, conferences or conventions, however credit is given for the workshops/seminars attended at these functions provided that the organization staging the workshop has verified attendance;

SCHEDULE B is for the development, presentation and mentoring of seminars or courses by the certificate holder;

SCHEDULE C recognizes that certificate holders gain knowledge and additional skills with job changes and their involvement in special projects, and;

SCHEDULE D is for the certificate holder's involvement in other activities, including performing non-remunerative duties for a professional or non-profit organization, personal study and the writing of articles and books, foreign language courses and non-related university degree courses.

| SCHEDULE A – Attendance at seminars and courses | | |
|---|--------------------|----------------|
| Description | Schedule ID | Credits |
| Attendance at seminars or in-house full day training (minimum 6 hrs) | A1 | 10 |
| Attendance at seminars or in-house half-day training | A2 | 5 |
| Attendance at special interest study groups, breakfast, lunch or dinner meetings less than 3 hours (minimum 1 hour) | A3 | 3 |
| Audio, audio-visual presentation (minimum 1 hour) | A4 | 3 |
| Attendance at accredited College or University level courses related to the field of local government (as determined by the Board and successful completion of course) | A5 | 50 |
| Attendance at LGMA "MATI" Programs (50 credits if taken for credit; 20 if taken for non-credit) | A6 | 20/50 |
| Completion of web-based correspondence courses related to the field of local government (as determined by the Board) other than university or college that require the submission of completed course assignments for evaluation before successful completion | A7 | 20 |

| SCHEDULE B – Development / Presentation / Mentoring of Seminars | | |
|--|--------------------|----------------|
| Description | Schedule ID | Credits |
| Development of seminars / courses (first time only) | | |
| Full Semester | B1 | 75 |
| Full Day (minimum 6 hrs) | B2 | 15 |
| Half Day | B3 | 8 |
| 1-3 Hours | B4 | 4 |
| Presentation of Seminars / courses | | |
| Full Semester | B5 | 75 |
| Full Day (minimum 6 hrs) | B6 | 15 |
| Half Day | B7 | 8 |
| 1-3 Hours | B8 | 4 |
| Mentoring | | |
| Full Week MATI Program | B9 | 75 |

| SCHEDULE C – Employment Activities | | |
|---|--------------------|----------------|
| Description | Schedule ID | Credits |
| Major changes in job responsibilities (10 credits per change to a maximum of 20 credits in a three-year period) | C1 | 10 |
| Major involvement for the first time in special projects | C2 | 10 |

| SCHEDULE D – Other Professional Activities | | |
|--|--------------------|----------------|
| Description | Schedule ID | Credits |
| Actively performing non-remunerative duties as an officer or committee member of a professional or non-profit organization (maximum 15 credits in a 3-year period) | D1 | 5 |
| Personal study of technical material for a minimum of 50 hours (maximum of 5 credits per year) | D2 | 5 |
| Self-training on applications software for a minimum of 50 hours (maximum of 5 credits per year) | D3 | 5 |
| Each article related to the profession published in a newsletter or external publication (maximum of 10 credits per year) | D4 | 5 |
| Non-related university degree courses (completion of course) | D5 | 10 |
| Foreign language courses (maximum of 30 credits in a three-year period) | D6 | 10 |

**Policy 4 Subject Areas Related To Local Government
Local Government Employees Certification *Regulation***

| Subject Areas | |
|-------------------------------|-------------------------------------|
| Aboriginal Studies | Horticulture |
| Accounting | Human Resource Management |
| Anthropology | Labour Relations |
| Architecture | Law |
| Biology | Leadership |
| Building Technology | Library Science |
| Business Administration | Mathematics |
| Communications | Organizational Behaviour |
| Computing/Information Systems | Parks and Recreation Administration |
| Criminology | Planning |
| Dispute Resolution | Policy Development |
| Economics | Political Science |
| Emergency Preparedness | Project Management |
| Engineering | Psychology |
| English | Public Administration |
| Environmental Studies | Resource Management |
| Finance | Risk Management |
| Geography | Sociology |
| History | Statistics |

Regulation Info 1 – Recognized Academic Institutions
Local Government Employees Certification Regulation
Information On Recognized Academic Institutions



Recognized Colleges, Institutions, Universities, and Associations for credit purposes

Colleges

Camosun College
 Douglas College
 Langara College
 New Caledonia (College of)
 North Island College
 Northern Lights College
 Northwest Community College
 Okanagan College
 Rockies (College of the)
 Selkirk College
 Vancouver Community College

Institutions

BC Institute of Technology
 Justice Institute of BC
 Nicola Valley Institute of Technology

Universities

Capilano University
 Emily Carr University of Art and Design
 Kwantlen Polytechnic University
 Royal Roads University
 Simon Fraser University
 Thompson Rivers University
 Trinity Western University
 University of British Columbia
 University of British Columbia – Okanagan
 University of the Fraser Valley
 University of Northern British Columbia
 University of Victoria
 Vancouver Island University

Associations

Certified Management Accountants (CMA)
 Certified General Accountants Association (CGAA)

Notes:

- i. This policy does not limit the Board's authority under its *Regulation* to consider applications on a case by case basis.
- ii. Many institutions offer distance options and online courses to students across B.C. and Canada. Please visit each institution's website for their online and distance options, or visit CivicInfo BC at <http://www.civicinfo.bc.ca/> for their "Guidebook to Local Government Education and Credentials in B.C.".

Appendix C

Board of Examiners Municipal Education Course

The original 1953 Municipal Education Course was a correspondence program offered through the University of British Columbia's School of Commerce. It was possible to have supplementary lectures in Vancouver if there were enough numbers. There were examinations for every course at the end of every year. Successfully passing each course was a requirement to receive a BOE certificate. Students who completed the first two years of the program, along with the required work experience, were eligible to apply for the Junior Certificate. Completing all four years allowed the student to apply for the Senior Certificate.

The Municipal Education Course classes are outlined below:

Accounting

First year – fundamental procedures and practice for business affairs

Second year – Fund Accounting, Accounting Statements and Records, Receipts and Disbursements, Elementary Budgeting, Public Utility Accounting

Third year – Detailed examination of various municipal funds, Auditing and Financial Reporting

Fourth year – Municipal Budgeting, Cost Accounting, Controls, Misc matters

Administration

First year – Organization of a Municipality, office management, Secretarial practice

Second year – Duties of Municipal Officials, Local Government and Democracy

Third year – Co-ordination of Municipal Departments, Municipal Boards and Commissions, Provincial-Municipal Administrative Relations

Fourth year – Personnel Administration, Purchasing Procedures, Property Management, Planning Public Relations, Administration Measurement and Evaluation

Economics

Third year – Introduction to Economics with special reference to the National and Local Government problems

Finance

Second year – Introductory Studies to Revenue, Expenditures and Municipal Debt

Third year – Property Tax Assessments, Appeals and Equalization of Assessments

Fourth year – Debt Management, Dominion-Provincial Financial Relations, Grants, Role of Department of Municipal Affairs

Law

First year – Outline of Constitution, Development in BC, BC Municipal Act, other units of self government

Second year – Consideration of Selected Statutes and *Regulations*

Third year – Contracts and Torts

Fourth year – Problems of Draftsmanship, Real Property, Equity, Land Registration, Cases

Appendix D

Focus Group and Interview Primer

Thank you for participating in the Board of Examiners focus group reviewing the *BOE Regulation*. The focus group will be discussing the topic of local government employee ‘competency’ and the Board of Examiners in general. ***Please read this over before the focus group session in order to be prepared for the discussion.*** Thank you!

This document will provide:

- 1) A brief overview about the Board of Examiners
- 2) A working definition of ‘competency’
- 3) The list of topical questions for discussion; and
- 4) Details on how to join the conference call for the focus group

1) Board of Examiners Overview

The Board of Examiners grants certification to local government employees who successfully fulfill the educational and work experience requirements. It is a voluntary program that primarily seeks to promote, encourage and recognize professional development for local government employees.

There are four different certificates divided into categories of work experience. The base certificate is available to any local government employee who fulfills the requirements. There are two certificates for management, one general administrative and one for statutory administrators, and a final certificate reserved for Chief Administrative Officers. For more information on the Board of Examiners, [please visit here](#).

***It would be ideal if participants could also look over the [BOE Regulation](#) before the focus group session.*

2) Working Definition of ‘Competency’

‘Competency’, for the purpose of the report, is focused on skills and knowledge:

- Skills and Knowledge can be taught
- Skills and Knowledge are **not** generic (i.e. reading and writing)
- Contextual, that is, skills and knowledge specific to **local government**
- Related to the business needs of local government

Please think about ‘competencies’ that relate to the business needs or success factors for local governments. **What ‘competencies’ does it take to make local governments successful?**

3) Focus Group Topical Questions

- 1 What 'competencies' (knowledge, skills) and work experience do you think are required or needed at the local government level?
- 2 What 'competencies' are required or needed for general local government service delivery?
- 3 What 'competencies' are required or needed for managers or statutory officers?
- 4 What 'competencies' are required or needed for senior managers?
- 5 What are the perceived strengths of using 'competencies' as a basis for professional development and certification?
- 6 What are the potential challenges or weaknesses of using 'competencies'?
- 7 Are the Board of Examiners certificates important to your organization?
- 8 Do you include the BOE certificate as a requirement in job postings?
- 9 Is work experience a component to be valued for the BOE certificates?
- 10 Do you have any suggestions or feedback you would like to share with the Board of Examiners?

3a) Interview Topical Questions

- 1 What 'competencies' (knowledge, skills) and work experience do you think are required or needed at the local government level?
- 2 What 'competencies' are required or needed for senior managers?
- 3 What are the perceived strengths of using 'competencies' as a basis for professional development and certification?
- 4 What are the potential challenges or weaknesses of using 'competencies'?
- 5 Do you include the BOE certificate as a requirement in job postings?
- 6 Is work experience a component to be valued for the BOE certificates?
- 7 Do you have any suggestions or feedback you would like to share with the Board of Examiners?

4) Call in Procedure

The conference call is being provided by Shared Services BC.

Dial-in Phone Numbers

1-877-***-**** Toll Free within North America

604-***-**** Vancouver local

Participant Conference ID: *****#

Conference Information

The following are instructions for your conference:

1. Enter the dial-in number and follow the voice prompts.
2. When prompted, enter your Conference ID followed by the # sign.
3. In the event you are unable to connect to the conference, please stay on the line and you will be automatically transferred to a conference representative.
4. If you require assistance at any time during the conference, press * 0 (star zero) for a conference representative.
5. Each caller can mute their own line by pressing * 6 (star six). To remove mute, press * 6 again (Tip: use this feature before putting your line on hold to prevent music playing into the conference).
6. For assistance: conference@conf-centre.com / 1-888-975-1325.
7. [Audio Conference Quick Start Guide: Tips and Commands](#)

Appendix E

Steps in the Creation of a Competency Model

Steps in the creation of a competency model

1. Define the objectives
2. Plan the methodology and collect data
3. Analyze data, identify the competencies and create a competency model
4. Apply, evaluate and update the model

Define the Objectives

Before starting the modeling process, there needs to be a foundation of understanding as to why the process is being done. There is a significant time and resource factor to building a model and similar to policy analysis a key component is clearly identifying the problem. The scope of the model must also be identified, whether the model is for a job family, a job group, a department, an entire organization, and a broader or narrower scope. It should also be identified at the start how the model will be applied, whether it is for all human resource functions, or only specific functions like recruitment, training, and succession planning (Lucia & Lepsinger, 1999; Marrelli, 2005).

Methodology and Data Collection

Data collection is necessary in order to discover the competencies necessary for an organization. There are a variety of ways to collect this information. Data collection is a necessary component for building a model from scratch, or when modifying an existing model. Organizations should use at least 2 data collection methods, to cross-check, corroborate the findings, and validate the results (Marrelli et al, 2005, Parry 2006). Data collected should also include a range of perspectives, from the general employee, to subject matter experts (SMEs), to managers, to supervisors, to human resource personnel (Parry, 1996). Again, this is to verify findings against each other to see which are true and which could be false perceptions. Commonly used methods prescribed by competency model experts are: focus groups, questionnaires/surveys, interviews and sometimes direct observation (Marrelli et al, 2005; Mirabile, 1997; Parry, 1996; Spencer & Spencer, 1993).

Focus groups

A focus group consists of a small group of employees, supervisors, senior executives, customers and/or subject matter experts. With the help of a facilitator, they discuss and discover competencies for their positions or for the organization. It stimulates dialogue between participants, though information can be biased in favour of dominant speakers.

- Advantages for focus groups include: time efficient, and once organized they are not resource-intensive (i.e. relatively low cost, unless the subject matter experts are highly paid consultants).
- Disadvantages of focus groups can include: challenging to bring all the participants together, participants that are not directly involved in the position or ignorant of the definition of competencies can result in false competencies or

identifying competencies that have value yet are not relevant to effective job performance (Spencer & Spencer, 1993; Mirabile 1997).

Questionnaire/Survey

A questionnaire offers a set list of competencies, taken from either a competency dictionary, a competency library, or recommended after consultation with subject matter experts, to respondents whether they are employees, supervisors, or some other group. They are asked to rate competencies related to their positions in order of importance, or however the questionnaire is phrased, how often a competency is used, how to tell the difference between an average and superior performance of the competency, and perhaps the questionnaire offers an open forum for feedback. Questionnaires are useful when there are lots of SMEs, when SMEs are not easily contacted, and when there are time constraints. A survey needs appropriate questions, the required sample numbers, and the results analyzed correctly.

- Advantages of questionnaires include: easy to use, cheap to implement, the organization can build ownership for the study.
- Disadvantages include: feedback is limited to the choices offered on the questionnaire, the competencies chosen could be irrelevant to the position, there could be important missing competencies, and there is not a dialogue or explanation of competencies (Spencer & Spencer, 1993; Marrelli et al 2005).

Interviews

An interviewer meets with individuals (SMEs, employees, managers, etc) to gather information leading to a list of competencies. A method of interview recommended by Parry (1996) and Mirabile (1997) is the traditional job analysis, where employees are asked to describe their role in as much detail as possible with questions targeted to the definition of competency being used. Skills, knowledge, ranking activities in importance, performance measurement observation, qualities required for the role, and other such questions are asked.

- Advantages: allows follow-up questions, more comfort on part of participant, clarity of purpose.
- Disadvantages: can be costly, requires a trained interviewer, time-consuming to conduct and go over results.

Behavioural Event / Critical Incident Interview

This is a technique originated by David McClelland, and based on John Flanagan's 1950 critical-incident interview technique for job analysis (Boyatzis 1982). Boyatzis used this technique as part of his Job Competence Assessment Method, as did Spencer & Spencer (1993). It is a style of interview where employees who are deemed 'superior' provide accounts of three successful and unsuccessful incidents in their position. Competencies are observed and taken from these detailed incidents.

- Advantages: receive very specific job behaviours, can discover non-routine and unusual behaviours, incidents can be used later for training and research, can be achieved through role-playing, case studies, or simulations.
- Disadvantages: time consuming, can be costly, facilitator needs to be highly trained and specialized to get good results, competencies may be missed because

they are 'ordinary', translating those behaviours into job descriptions can be difficult.

Direct observation can get a reasonable complete picture of manual, repetitive jobs, however it is also limited to those kinds of jobs, and a researcher cannot observe mental processes (Mirabile, 1997). While it is a data collection method, it seems more appropriate as a back-up method.

An organization's available time, and resources (financial or personnel) all impact which method of data collection they choose.

Analyze data, identify the competencies and create a competency model

The first step is to clearly define the job(s) for the model being designed. Competencies cannot be identified properly until the job is defined, and this can be done through job descriptions, training manuals, organization policies, performance records, job supervisors and human resource staff.

Then the competencies can be identified according to the job description. The data collected is analyzed and an initial list of competencies is compiled. A recommended approach to making the initial competency list is the following (Marrelli, 2005):

1. Identify the knowledge, skills, abilities and other characteristics required for each duty
2. Group similar knowledge, skills, abilities and other characteristics to create a broader category. Essentially cluster together similar competencies
3. Give each category a label, this will become the overall competencies for the model
4. If there are multiple levels of a job being analyzed, and there is usually is if an organization is creating a model for their entire staff, then create a separate list of clustered competencies for all the levels (for example, one for regular staff, one for supervisors, one for department managers and one for senior managers)
5. Identify the competencies common to all levels, and those specific to each level
6. If possible compare the clustered competencies to other competency models (to benchmark the initial list)
7. Create an initial list of the required competencies
8. Write a draft definition for each competency

Assemble the model using the clustered competencies which are critical to job performance, create it as simply and visually as possible, present it to SMEs and revise the model based on their feedback. Finally, once the model has been confirmed by SMEs, develop behavioural examples for each of the individual competencies within the clusters. Mirabile (1997) suggests using example models to show SMEs so they can visualize the model as it will look. The format should be controlled by the collective input of the people who will use the model.

Models can also be different because of their structure. The number of competencies varies per model. Because of the lack of consensus on definitions and style, there is no set number of competencies. However, the recommended number of competencies is on the lower side, with between 10-20 as an amount that can fully encompass a position without being too broad or unwieldy. The latest research from Campion (2011) recommends 12 competencies in a model. For simplicity competencies are often grouped into clusters or categories of related competencies, which also differ in number between models. Descriptions of competencies also vary, from the appropriate length of a competency explanation, to sample behaviours, to levels of competency with exact descriptions of what each level represents and how it can be observed. Essentially, organization's need to choose which format is best for their purpose.

Apply, Evaluate and Update the Model

A competency model process does not end upon application. The competencies should reflect the present desires of the organization with a look to the future. As the desires of the organization change, the competency model must change as well or become invalid, or at worst counter-productive. A system of review should be built into the model itself, with a rate change depending on the nature of the job and the desires of the organization (Marrelli, 2005).

Appendix F

20 Best Practices for Competency Modelling

Campion and his team are the most recent group of researchers to approach competencies and competency modelling. Their 2011 report compiles a list of 20 best practices for consultants, human resource departments and other researchers to follow. The best practices are split into three parts: analyzing competency information, organizing and presenting competency information, and using competency information. Many of their best practices address the advantages and disadvantages discussed in this literature review and together they form a foundation intended to build a competency model. The best practices are aimed at bringing up to date ways of applying the research in the North American approach to competencies.

Part One: Analyzing Competency Information

- 1- Consider organizational context: Adapt the model to the organization (culture, unions, customers, market, and other factors). Competencies should align to corporate strategy and foster a competitive advantage that shifts over time.
- 2- Link competency models to organizational goals and objectives: Models direct attention to goals, this creates the difference between job analysis and competency modeling. The first step of competency modeling is to define the organization's goals and objectives.
- 3- Start at the top: Begin the model with top executives to get support and buy-in, have an idea of the future direction, and to get proper organizational language.
- 4- Rigorously research and develop competencies: Use staff trained in research methods to find competencies. Use direct observations, SME interviews, focus groups, clear definitions, surveys, sampling techniques, and stats analysis. Create a project advisory group to guide the model process.
- 5- Consider future-oriented job requirements: Answer the questions "What will be needed in the future?" or "What should be needed?"
- 6- Use additional unique research methods: Use behavioural event interviews, employee surveys, and compare average to superior performers. Consider using superior standards as "average" to raise the standard.

Part Two: Organizing and Presenting Competency Information

- 7- Clear and thorough description of competencies: Describe a competency very thoroughly-include a descriptive label or title, and a definition in detailed behavioural terms.

- 8- Define levels of proficiency on competencies: Levels of proficiency may indicate progressive levels of competency development, levels of performance, job grade level, etc. Define in terms of observable behaviours.
- 9- Use organizational language: Tailoring to a unique language makes a model “your own” and increases internal communication and use of the model. However, it takes more effort, a lack of it may pose a barrier when the model is used for recruitment, and colloquial terms can date quickly.
- 10- Include Fundamental (Cross-job) and Technical (Job-specific) competencies: Some competencies may be common across jobs, others are more unique. When making a model that spans jobs, it is good to include Fundamental competencies that refer to basic capabilities, and unique Technical competencies. Management and leadership competencies are Technical. Fundamentals are applicable to every position within an organization.
- 11- Use competency libraries: Refers to lists of competencies that can be chosen when making a model for efficiency. This helps ensure consistency across models. Libraries are offered by consulting firms and these competencies are universally important, are stable over time, and overlap with organizations for similar positions. Libraries can be starting points for building a unique model, decreasing time and cost. There are disadvantages such as the competencies are not tailored to the organization, employees may not “buy into” the model if it was created without their input, competencies could be chosen outside a job’s area, and too many competencies could be chosen.
- 12- Achieve the proper number of competencies and amount of detail: It is a balance between detail and simplicity. Detail is good for linking to HR systems, yet simplicity is good for employee acceptance and use. Fewer competencies with more detail are better than a multitude of competencies with minor detail. Competencies can be hierarchical, divided into categories and subcategories, although two levels is the recommended maximum. There is no ideal number of competencies, yet it is recommended to keep the number around 12.
- 13- Use diagrams and pictures: Use visuals to show competency models to employees. Keep it simple and focus on the core idea of the model.

Part Three: Using Competency Information

- 14- Use widespread involvement of organizational employees: This will help in the acceptance and use of the model. “It is better to have a simple and crude model that people will use than a highly sophisticated, research-based model that people may ignore.” (p.250) Data is collected from employees and returned to them in the form of a model. A shared definition of the future of the company is created through consensus. This should happen at all stages of developing the model- planning, data collection, model developing and evaluation, and implementation.

- 15- Use competencies to develop human resources systems: This is main reason for creating a competency model. Competencies relate to HR systems by describing levels of proficiency which can translate into evaluation. Models usually distinguish between average and superior performance which can link to performance management. The connection between the model and organizational goals also links HR systems to organizational goals.
- 16- Use competencies to align the human resources systems: A model aids in sharing the same set of KSAOs and same language between employees and HR. Hiring, training, promotion, and pay are linked to KSAOs, which are linked to high performance and organizational goals, therefore HR can reinforce the same competencies
- 17- Use competencies to develop practical awareness of effective job performance tailored to the organization: Models can explain the nature of effective performance for an organization. It can describe what really matters to the organization.
- 18- Use technology: Make models electronically available for employees during all stages of development and implementation.
- 19- Update the model: Create a plan and timeline for updating the model during the planning stage.
- 20- Use competency modeling for legal defensibility: Models should be developed using scientifically rigorous methods and validated.

Appendix G

Survey Results – Suggestions for the BOE

There were a number of suggestions offered by respondents to improve the BOE certificates. They are not listed in any order of priority.

- Employers should be requesting or ensuring that their employees get certification. Other professional bodies do so, so should local government.
- There should be a step program to certification, so someone can build work experience towards full certification.
- There should be more flexibility with scholarships, especially for remote areas. Scholarships make a big difference for small local governments.
- Create an evaluation system based on experience and education to get certification without taking additional courses.
- More of the in-class format for courses. It is better for networking.
- Reach out to potential students and candidates more proactively.
- There should be clearer requirements and website information.
- The BOE should be marketed as a professional designation.
- Review the definition of ‘management’. Previous management experience in another role should be tied with regular local government work experience.
- Hand over the BOE to the LGMA, having the province involved is pointless and the program should be run by a professional association.
- Allow people who work with, but not in, local government a chance to get certification.

Appendix H Survey Results

Questionnaire for Local Government Employees and Students of Local Government
Respondents 214 Launched Date: May 2, 2011 Closed Date: June 9, 2011

1. What is your age?

| | Response Total | Response Percent |
|-------------------|----------------|------------------|
| 18-25 | 6 | 3% |
| 26-35 | 25 | 12% |
| 36-45 | 63 | 29% |
| 46-55 | 92 | 43% |
| 56+ | 28 | 13% |
| Total Respondents | 214 | 100% |

2. How long have you worked in a B.C. local government?

| | Response Total | Response Percent |
|-------------------------|----------------|------------------|
| Never | 9 | 4% |
| 1-5 years | 55 | 26% |
| 6-10 years | 34 | 16% |
| 11-15 years | 30 | 14% |
| 16-20 years | 37 | 18% |
| 21+ years | 45 | 21% |
| Total Respondents | 210 | 100% |
| (skipped this question) | | 4 |








3. How long do you anticipate working in a B.C. local government?

| | Response Total | Response Percent |
|-------------------------|----------------|------------------|
| 0-5 years | 32 | 15% |
| 6-10 years | 38 | 18% |
| 11-15 years | 38 | 18% |
| 16-20 years | 27 | 13% |
| 21+ years | 78 | 37% |
| Total Respondents | 213 | 100% |
| (skipped this question) | | 1 |




4. What is the highest level of education you have received or are working towards?

| | Response Total | Response Percent |
|--|----------------|------------------|
| Some college or less | 18 | 8% |
| College / professional or technical certification / accounting designation | 86 | 40% |
| University undergraduate degree | 64 | 30% |
| Graduate | 45 | 21% |
| Total Respondents | 213 | 100% |
| (skipped this question) | | 1 |







5. In what general area of local government do you work?

| | | Response Total | Response Percent |
|---|--|----------------|------------------|
| General Administration |  | 116 | 54% |
| Finance |  | 34 | 16% |
| Planning, Engineering & Development |  | 23 | 11% |
| Recreation, Parks and Cultural Services |  | 6 | 3% |
| Emergency Services |  | 5 | 2% |
| Infrastructure Services |  | 6 | 3% |
| Other |  | 23 | 11% |
| Total Respondents | | 213 | 100% |
| (skipped this question) | | | 1 |

6. What type of B.C. local government do you work for?

| | | Response Total | Response Percent |
|-------------------------|---|----------------|------------------|
| Municipality |  | 163 | 77% |
| Regional District (|  | 34 | 16% |
| Improvement District | | 0 | 0% |
| Other |  | 16 | 8% |
| Total Respondents | | 213 | 100% |
| (skipped this question) | | | 1 |





7. What region do you work in?

| | | Response Total | Response Percent |
|-----------------------------------|---|----------------|------------------|
| Northern BC / Cariboo |  | 38 | 18% |
| Lower Mainland |  | 55 | 26% |
| Vancouver Island / Sunshine Coast |  | 50 | 23% |
| Thompson-Okanagan / Columbia |  | 49 | 23% |
| West Kootenay Boundary |  | 12 | 6% |
| East Kootenay / Rocky Mountain |  | 10 | 5% |
| Total Respondents | | 214 | 100% |






8. Prior to this survey, were you aware of the Board of Examiners and Local Government Employee Certification?

| | | Response Total | Response Percent |
|-------------------|--|----------------|------------------|
| Yes |  | 187 | 87% |
| No |  | 27 | 13% |
| Total Respondents | | | 214 |







9. If you already have a BOE certificate, which one(s) do you have?

| | | Response Total | Response Percent |
|---|---|----------------|------------------|
| Local Government Service Delivery |  | 17 | 8% |
| Local Government Administration |  | 17 | 8% |
| Local Government Statutory Administration |  | 6 | 3% |
| Local Government Executive Management |  | 1 | 0% |
| Pre-2006 BOE certificate |  | 35 | 16% |
| Total Respondents | | 214 | |

10. Are you actively working towards a new Board of Examiners certificate?

| | | Response Total | Response Percent |
|--|---|----------------|------------------|
| No. |  | 134 | 64% |
| Yes; Local Government Service Delivery (requires service experience) |  | 20 | 10% |
| Yes; Local Government Administration (requires managerial experience) |  | 30 | 14% |
| Yes; Local Government Statutory Administration (requires experience as a financial or corporate officer, or a deputy to a financial/corporate officer) |  | 16 | 8% |
| Yes; Local Government Executive Management (requires experience as a Chief Administrative Officer or as a deputy to a CAO) |  | 8 | 4% |
| Total Respondents | | 208 | 100% |
| (skipped this question) | | | 6 |

11. How important is a BOE certificate to your career aspirations?

| | | Response Total | Response Percent |
|----------------------------------|---|----------------|------------------|
| Important |  | 57 | 27% |
| Somewhat important |  | 76 | 36% |
| Neither important or unimportant |  | 31 | 14% |
| Somewhat unimportant |  | 7 | 3% |
| Unimportant |  | 23 | 11% |
| Don't know |  | 20 | 9% |
| Total Respondents | | 214 | 100% |

12. How important is the certificate to your employer?

| | | Response Total | Response Percent |
|----------------------------------|--|----------------|------------------|
| Important | | 33 | 15% |
| Somewhat important | | 78 | 36% |
| Neither important or unimportant | | 42 | 20% |
| Somewhat unimportant | | 7 | 3% |
| Unimportant | | 20 | 9% |
| Don't know | | 34 | 16% |
| Total Respondents | | 214 | 100% |

13. In your experience, is a BOE certificate required in local government job postings:

| | | Response Total | Response Percent |
|-------------------------|--|----------------|------------------|
| All the time | | 2 | 1% |
| Most of the time | | 23 | 11% |
| Sometimes | | 99 | 47% |
| Infrequently | | 49 | 23% |
| Never | | 37 | 18% |
| Total Respondents | | 210 | 100% |
| (skipped this question) | | | 4 |

14. What value do you see in obtaining a BOE certificate?

| | |
|-------------------------|-----|
| Total Respondents | 144 |
| (skipped this question) | 70 |

15. From your experience, please identify the challenges you faced, or are facing, in obtaining a BOE certificate. Please rank your challenges in order of significance, with 1 being the most significant:

| | | Response Total | Response Percent |
|--|--|----------------|------------------|
| view Application process | | 88 | 61% |
| view Equivalency of courses between institutions | | 90 | 62% |
| view Scholarship availability | | 76 | 53% |
| view Post-Secondary course availability | | 91 | 63% |
| view Access to post-secondary institutions | | 87 | 60% |
| view Funding from the employer | | 88 | 61% |
| view Workplace policies of the employer | | 81 | 56% |

| | | | | |
|----------------------|---------------------------|--|-------------------------|-----|
| view | Personal time constraints | | 130 | 90% |
| view | Personal funding | | 84 | 58% |
| view | Lack of work experience | | 91 | 63% |
| | | | Total Respondents | 144 |
| | | | (skipped this question) | 70 |

16. From your experience, what other challenges have you faced, or are facing, in obtaining a BOE certificate? You may also choose to expand your answer on an identified challenge from Q15.

| | | | |
|--|--|-------------------------|-----|
| | | Total Respondents | 106 |
| | | (skipped this question) | 108 |

17. Do you have any suggestions or feedback you would like to share with the Board of Examiners?

| | | | |
|--|--|-------------------------|-----|
| | | Total Respondents | 73 |
| | | (skipped this question) | 141 |

Q14) What value do you see in obtaining a BOE certificate?

1. Training in local government practices of BC. Puts local government theory and practice in BC context.
2. It is a measure of qualifications.
3. none, I think a degree or diploma in your field of specialization should suffice, and that the LGMA offers sufficient training through their bootcamp and MATI programs for the training of new Local Government staff.
4. Very relevant to local government careers. Exposes students to all aspects of local government.
5. Not sure I do anymore, it kept changing, was cumbersome to go through
6. There is value for those whom have not had/ do not have the opportunity to pursue advanced education.
7. Essentially, none at this stage of my career.
8. I am new to Municipal Government and currently taking the 4 core courses for the Public Admin. I think the BOE Certificate is a must to continue to work in Government.
9. It suggests that one has a certain body of knowledge in LG subject areas.
10. A BOE Certificate recognizes dedication to improvement, both personally and professionally, within and towards one's local government role. Reduces stagnation and assists with keeping "on top of the game" professionally through educational upgrading.
11. benchmarking standards for professional qualifications
12. I believe that having a certificate has provided me with opportunities for advancement within the local government I work for.
13. knowledge
14. In the case of the pre-2006 certifications (mine are the intermediate and senior certificates in local government administration), certification is confirmation of a combination of relevant experience and academic accomplishment. Certification would signify that an individual has performed capably in a position for a period of time and has demonstrated the requisite intelligence and

perseverance to achieve a level of academic success.

15. Provincially recognized credentials
16. Its a credential which relates specifically to local government experience, and seems to have some traction with LG employers.
17. it validates my training/experience as a professional in the local govt field - otherwise there is too wide a variety of degrees/certificates that enable a person to gain employment but nothing else supports that they indeed have experience in this field.
18. Great value both academically and in meeting people
19. more uniformity in job descriptions
20. Job advancement - nice to be able to show that you were dedicated to following it through and achieving certification from a provincial body.
21. For me there is none as I have a graduate degree and 25 years experience with the same employer. For individuals with less education/experience having a certificate may make them a better job candidate than others with the same level of education/experience.
22. I can see how this knowledge is beneficial to municipalities, so I can appreciate that my employer would most likely want its management staff to be doing these certifications unless they already have similar education.
23. For me it is the professional development process I get to go through in order to obtain BOE certification. I enjoy advanced learning and having a certificate at the end of the journey is an added bonus.
24. Learning is always a good thing, your employer takes note when you achieve and it is another great item for the resume.
25. assist with advancement in my career
26. Could potentially compensate for not having completed formal degree program.
27. - personal goal and to ensure your experience and knowledge is standard.
28. Holding the actual piece of paper is valuable only when seeking employment or advancement. However, the learning that is gained through taking the courses is invaluable.
29. Greater base knowledge of working in Local Government.
30. Gives a sound knowledge base for Local Government
31. Looks great on a resume.
32. I think it helped me make the transition from working as a Secretary Treasurer to working as a Chief Financial Officer. Having the course work for the diploma in public government, completed before I started working for the municipality, I think, improved my desirability as a prospective employee.
33. Provides a very well-rounded background on municipal government. Very "hands-on".
34. Increased understanding of all aspects of municipal government, broader knowledge of where we fit with regional boards and higher levels of government, ability to do produce superior work
35. A BOE certificate would enable me to advance in my career to the position I am vying for.

36. For the employer it shows employee initiative and that the person they are hiring has taken extra courses to develop their job skills.
37. The courses leading to the BOE certificate were very valuable in terms of quickly gaining a deeper understanding of the local government environment.
38. The BOE is a recognized program across British Columbia and is another form of certification specific to the local government field. For Municipal Clerks/Corporate Officers there are limited certifications available specific to the position therefore the BOE certificate in statutory administration is valuable.
39. It gives employees a basic level of competency that the employer can rely upon when evaluating potential employees
40. Focused professional training
One of a number of hoops to go thru to appear qualified
41. Tremendous value
42. BOE certificate sets a standard for knowledge and initiative necessary to hire qualified staff.
43. To have an official recognition of my education and experience in Local Government.
44. Adds credibility. Personal gratification.
45. Not relevant at higher levels of larger municipalities.
46. It is an indication of the quality of education/training for positions in local government
47. Relevant training.
However, at 10 courses for a certificate, why not just do a diploma for 11 courses? So I personally, will likely do a diploma instead.
48. It is a valuable form of recognition of education and experience.
49. The Courses provide a good overview of local government and provide useful information when first entering a municipal environment. Working in Corporate Administration, we deal with all aspects of the local government. The core classes were beneficial and provided me with a better understanding of the requirements and limitations of local government.
50. it will assist me in obtaining consulting work after I retire
and for my personal satisfaction
51. A recognition of the level of expertise I've attained by virtue of my experience.
52. Recognition. Learning.
53. Helps to understand the overall management and operation of a municipality. I think it should be a requirement for any manager in a municipality. Those who don't have the certificate don't always understand processes and reasons for decisions.
54. Shows that individual is interested in the field of study, in furthering their career
55. Industry recognition
56. self satisfaction
57. An excellent credential for career advancement and/or employment opportunities.

58. An excellent credential for career advancement and/or employment opportunities.
59. Doing it just for kicks
60. Statutory Admin certificate essential for either of the required officer positions
61. Forces municipal employees to obtain education directly related to local government.
62. The value I see in obtaining a BOE is that a potential employer in local government would be more apt to hire you. However, I also feel that if you have the working experience you have obtained the knowledge. A certificate gives you the paper. But the working knowledge should give you something as well.
63. BOE certainly helps and provides additional support towards your degree. It also confirms that you have actual local government experience.
64. More trained professionals that contribute to the organization and community in a more relevant way
65. Recognition by peers and potential employers
66. The outcome that encourages the training
67. Recognition of value in local government education and experience
68. lends credibility
69. Knowledge and education give better job opportunities
70. A BOE Certificate would recognize the years of experience that I have obtained by working in the local government field.
71. Shows qualifications to potential employers; professional development, personal satisfaction
72. Additional education is always important. As well, the credentials may be important for future employment.
73. Provides the opportunity to have an enhanced understanding of matters dealt with on a daily basis as well as a better global understanding of local government in general.
74. Recognized certification within th municipal world
75. I am retiring in a couple of years however the BOE cetificate is very important. When I first started they only had MATI courses and Municipal Law. Also the certification requirements for the CMC designation are important.
76. I have a degree in Business Administration but it would mean that I have formal qualifications directly related to my position.
77. Have a broaden spectrum of job opportunities; a BOE certificate is recognized in all facets of government administration.
78. Valuable if I want to become a CAO or Deputy CAO
79. Not too much as I have a Masters in Public Administration and most employers don't ask for a BOE certificate
80. It would provide value to me by "standardizing" the knowledge and experience I and many others have in local government and offering me some recognition from others that I have demonstrated the required knowledge and skills to do my job or others whether at my current employer or elsewhere in the Province. I think that having the certificate would lend credibility to my

employment/role in the municipality and community, to many who may not understand or appreciate the role of local governments.

81. standardization of skills and abilities
82. Receiving training in an curriculum specific to local government.
83. It is a statement of progress and accomplishment established against a broad benchmark.
84. I believe it provides another level of recognition at the "next" level of administration
85. Not sure
Not exactly sure given there seems to be a real lack of understanding and recognition of what it means and what it takes to obtain a certificate. There is little if any correspondence that ever comes out on this subject, encouraging local government employees to pursue this.
87. provides additional recognition of the education that you have received
88. It would be good to add to the resume. It has never been asked for when I apply for jobs. The courses are relevant to local government work though.
89. There is not alot of education/specific designations related to local government. It is nice to be able to receive specific education/designations that are specifically related to local government.
90. Unsure
Recognition of the combination of experience and education is very valuable. It is helpful when applying for new positions - both internally and externally. It is a transferable certificate that is not focused on technical skills but rather the skills need for excellence in service provision.
92. This is personal gain for myself. I am of an age that I should have done it years ago, so this is a goal for myself.
93. The learning much more than the piece of paper. There are those here that like employees to get the PADM courses, and some feel it doesn't matter.
94. If I ever look for new job or my employer takes an interest in having staff certified this could benefit me
95. Having more credentials is always a plus.
96. Not sure
97. Value it provides on a resume.
98. 1. Committed to local government service delivery improvements and,
2. Identifies commitment to the Nisga'a Village of New Aiyansh personal development to be certified and preparing for Taxation Year 2013.
99. Credentials; Role modeling
100. Improved knowledge
Broader career opportunities
101. I plan to apply as I can use the education and experience that I already have. I would likely not pursue a BOE otherwise.
102. Better understanding of how the local governments in BC function; expanding the circle of friends and colleagues; the extraordinary opportunity to be guided and instructed by the best in the field; presentations provided by the best of the best in the field; gaining the most relevant and important knowledge related to our jobs; becoming experts in our own jobs; advancement

opportunities and much, much more.

103. At this point it doesn't seem to be widely recognized as a credential for the types of jobs I'm interested in
104. Job security; promotion opportunities.
105. I am motivated to learn about the big picture of Local Government. This will inform my ability to perform my job as well as move up in my profession.
106. I suppose if there was relevance to job function then it would be very beneficial.
107. Providing me with more knowledge within Local Government as well as the ability to move up into a Management position.
108. Provides greater knowledge in areas that I may not deal with on a regular basis.
109. It will provide me with the necessary knowledge to advance in a Local Government.
110. Personal achievement and broader recognition of that achievement.
111. More versatile and can move up the ladder faster
112. an provincially recognized certification and designation within a professional peer group
113. I find the BOE Certificate program very valuable as a local government employee, as it adds value to the continued services you provide for the local government industry. It adds a distinction and recognition for the individual and in many cases will help to build a comprehensive C.V.
114. I have never been required to consider one, nor has it ever been mentioned as a possibility or potential necessity.
115. The networking it provides and shared experiences are invaluable.
116. Better understanding of how local government works.
117. Provides a value to the education obtained to further knowledge of local government service delivery and management. Complements existing degree. Could provide beneficial should I ever decide to move to another form of local government or a different position.
118. Not only do you become a greater asset to the municipality (in my case) but I would hope for some succession within the corporation.
119. Additional certification to show my interest and passion for local government and my career.
120. The course took time and dedication. It provided networking opportunities that would not otherwise be possible and the certificate provides me with recognition of the work that I currently undertake.
121. I don't see value in pursuing the BOE.
122. In my experience, employers want to see technical or academic certification (diplomas, degree, certificates, etc.). Many will not even consider an applicant that doesn't meet some level of minimum certification.
123. Only that it will allow me access to other job opportunities that may not exist despite a significant employment history, as many positions today expect applicants to have some kind of formal degree, diploma or designation
124. To standardize the recognition given for a combination of education and work experience for individuals working in our field.

- I'm an immigrant and relatively new to the local government institutional context. Even as a manager, you can't learn everything you need to know by osmosis - might as well do it and get a certificate that shows I made the effort.
125. Further education and certification that is particular to the local government environment
126. It certainly indicates your interest in local government and your ability to undertake research, work independently and further that you have some substantive knowledge of local government.
127. Validates practical experience and theory upon completion.
128. Broadening experience and understanding of issues/regs relevant to local government employees and service delivery. Open up opportunities or awareness of other potential roles within local government.
129. Obtaining a certificate shows that you are dedicated to your profession and that you have the knowledge necessary to perform the duties.
130. It illustrates knowledge of specific local government issues and interests as well as the broader theoretical administration knowledge.
131. The courses leading to a BOE certificate encourage free thinking on local government and alternate service provision. I think it increases understanding of how issues can be addressed and improvements can be made.
132. Ongoing education in local government is valuable to all government employees and managers recognize employee initiative for continual learning.
133. Makes one more marketable and provides motivation to take higher education to meet the academic requirements for the certification.
134. There is more emphasis on 'certification' when applying for Regional District jobs in the last few years. However our job postings almost never cite having a BOE certificate as a mandatory qualification.
135. Was valuable at my stage of career several years ago. Not as valuable given graduate education obtained subsequently.
136. give you an edge on resume
137. future employment opportunities
138. It seems to me that most senior managers have obtained this, and it is expected that one has it to be considered for those positions.
139. I do not work in local government, it is not a requirement for my current or future career goals. I work in the BC Public Service and found the courses I took relevant for external education. However, I am ineligible for the BOE certificate as I do not work for a local government.
140. Obtaining a BOE certificate would be an asset when applying for a variety of positions that I am interested in.
141. Obtaining a BOE certificate would be an asset when applying for a variety of positions that I am interested in.
142. I have received my certificate two years ago when changing careers and the certificate was very important to my new employer.
143. If I were interested in working in local government, I would probably see the value in terms of attaining a job
- 144.

Q16) From your experience, what other challenges have you faced, or are facing, in obtaining a BOE certificate? You may also choose to expand your answer on an identified challenge from Q15.

1. The work experience is difficult to accumulate if you are not already in local government, for obvious reasons.

2. I was not given credit for many of my post-secondary university level courses that I took when I was working towards my undergrad degree as they were not considered relevant to my work. I tried to challenge this but was unsuccessful.
3. Haven't looked at it in a while but last I looked it just seemed there was always one more thing I needed to get or do and I just couldn't be bothered anymore, if you have 15 years in the business, 6 or so years as a CAO and an MBA should BOE certification be difficult and what does it mean to anyone else?
4. I live in Northwest BC and there is not much in this area for public admin training and courses. It is very expensive to travel.
5. Transitioning from pre-2008 program (Intermediate Certificate) to new certification program and the availability of equivalency courses for advanced certification at learning institutions other than UVIC.
6. none
7. very few # of years before retirement
8. Sorry, I wish I knew more about the BOE certificate. I will do more research now to see what it entails.
9. My former employer was extremely supportive of my application for certification so I did not find any of the other challenges a problem.
10. I would have liked to get a senior admin certificate, but my current job doesn't qualify me for it. So - how do I get the credential to show I can do the job? The Intermediate Certificate I have just reflects where I was at the time; it did not help me to move forward. The whole idea that a person must be in the job first before qualifying for certification seems backwards to me.
11. When the BOE changed, it became more difficult - the intermediate certificate was unavailable to me because I did not have enough experience as a Municipal Clerk, was short a few months but had the courses required, once the Service Delivery certificate was initiated I applied for it but the Intermediate Certificate is held in higher standard even though it required less education. Now there's only the Admin Certificate that I can qualify for - will have more experience and education than I would have for the Intermediate Certificate and yet its still perceived as higher.
12. Personal time and balancing work and family was the toughest consideration by far
13. I did not complete question 15 because I have not tried to get this certification. I may do that in the future, but I have only been in my position for about one year so there has not been time to pursue this and so far I have not been asked to do so by my employer. I think this is because they are waiting for me to get grounded in my role here before asking me to take on more education, as this does seem like something my employer would find useful.
14. I find that you are somewhat limited in the type of BOE certification you may receive. What you are able to obtain doesn't always marry with your professional aspirations.
15. At this point in my career, with only 5 or so years left, one has to consider if there is value in investing (both cost and time). I've always found that while courses are great, on the job experience is worth a lot more. This being said, I believe the creation of large 'HR' departments has led to a greater value being placed on the paperwork and certificates on your resume rather than actual on the job experience - I feel this is very unfortunate.
16. mostly just time
17. I have not received information to date on process and find access on internet too cumbersome to review the various options.
18. Location of where courses are offered - requires time off and attending on Saturdays.
19. - I find the process very cumbersome. I have a degree in Recreation Admin, a Diploma in Public Sector Management from U of Vic and some local government classes through Cap University. This with 20 years of local government work experience. I still don't qualify for the certificate in admin as some of the classes that I have in the subject area are not considered equivalent.

- when asked for consideration I have been told to retake classes and re-register at the U of Vic.
- 20. No challenges - simply a matter of committing the time.

I have been successful in receiving my Local Government Administration Certificate from Capilano College (now University) as my Supervisor, and my municipality were supportive. The facility was only about an hours drive away, and I did not have any major obstacles signing up for the courses I wanted or the equivalencies I had applied for. Overall, a pretty satisfying experience. I graduated in the Fall of 1999.
- 21. My family is still young so I am not currently taking any courses, however it is always on the back of my mind to complete my Certified Municipal Clerk training.

I did not have any problems, except finally obtaining the work experience. I am grateful that the Board of Examiners accepted my argument that experience as a Statutory Financial Officer in a school district should be worth some credit towards the work experience requirement. They did not give a 1:1 ratio, but it did help when the Board amended their *Regulations*.
- 22. The only challenge we have faced is the "elective" pre-requisite. My understanding is that only education completed less than 10 years ago is acceptable. We have employees who are Engineers and Planners who must continue to keep their education up-to-date in order to maintain their membership in their respective associations - - but neither their original education/degree (because it was >10 years ago) nor their ongoing training/education is considered applicable for their elective.

In small communities, you deal with many aspects of municipal government - a front line receptionist in a 3 person office may be developing policies and bylaws, acting as Chief Election Officer, etc but not have a title that matches the work load. The BOE recognizes title rather than the actual work component.
- 23. In all honesty, I have only just begun to look at what would be required to achieve a BOE certification. To personally incur the cost at this point in time is prohibitive as I have 2 children in university. I applied for a scholarship related to MATI Foundations (an excellent experience) and was not successful. I have been told that they are difficult to obtain but I will revisit that option.

I was a CAO for three years before I took this job (lesser title and responsibilities). I want to apply for the Executive Management certification but just do not have the time to put forth to producing a paper at this time.
- 24. Time off work for courses requiring physical attendance.
- 25. Work experience as a manager and in the position of Deputy Corporate Officer.

I don't really find any of the above daunting. The equivalency between institutions is a little confusing. From a longer term government employee perspective, if we want to encourage students to consider local government as a career, the four core courses (at least) should be available to individuals who are not already working in local government. Gives the students a leg up in entering the field and also provides employers with a larger pool of somewhat trained individuals.
- 26. Operating at a senior management level in Municipal Government does not allow much time to attend to this.

Some employers allow employees paid education leave, others do not. This creates a challenge for younger staff, with less seniority and vacation/banked overtime who want to embark on courses. Was not particularly an issue for me, however.
- 27. The one thing that is preventing me from obtaining the certificate right now is the fact that most of my post-secondary education comes from Europe and therefore is not recognized as applicable to my application. So I basically had to start from the scratch and I'm still in the process of taking the courses for credit, even though I may possess the knowledge in the required fields.
- 28. My experience is so dated as to be irrelevant.
- 29. na
- 30. na
- 31. na
- 32. na
- 33. na
- 34. na

35. The equivalency is a challenge for me as I have applied for the Executive Management certificate and have adequate course although they are not from UVIC so they are not transferable. Now I must re-assess my desire to apply.
36. With regard to Q15, I found personal time constraints to be the most significant, lack of work experience would be the next. The courses are offered online locally so they were easy to sign up for. What I did find very frustrating is the method of delivery - I prefer classroom settings for this type of learning.
37. As I had already obtained an MPA degree, I faced no real challenges in obtaining my Senior and Advanced Certificates.
38. I did not find the process challenging. I was able to take courses on-line as well as intensive courses on campus at U-Vic. My employer paid travel costs and course costs.
39. Missing above - no ability to have work experience and alternate courses i.e. from an alternate undergraduate degree, applied towards entry level course requirements.
40. Don't recall - mine was received in 1988 which is a long time ago. I don't recall any difficulties!!
41. Don't recall - mine was received in 1988 which is a long time ago. I don't recall any difficulties!!
42. You will need manager experience to get the Local Government Administration cert.... but trying to get to management is precisely why you want the cert in the first place.
43. I experienced no challenges in obtaining a BOE certificate.
44. Conflicting Education - working on Bachelor of Commerce, in addition to accounting degree, and diploma in Local Government Administration
45. Living in the north. It would be nice to have these type of courses available online. Perhaps they are now. I started the administration certification, and had to fly to Vancouver one a month. That was 10 years ago. I never finished because of family matters and being a mother, raising children.
46. I found the most difficult challenges when the program first started was the limited training access in the northern BC communities. Additionally over the years the program have really been streamlined with the support of the LGMA.
47. A combination of all the problems identified in Q15 is usually found in dealing with obtaining a BOE certificate. Those seem to be enough for me.
48. BOE certificates obtained prior to 2006 don't seem to be recognized as well as those issued since that time, even though the work and time commitment to get the certification was just as challenging to the employee.
49. Found the online course available through UVIC not very well organized
50. Age, now looking at retirement
51. Living in a rural community with no "physical" access to an educational institute, time constraints - as senior manager in a small municipality there are many functions that I am in charge of therefore I work upwards of 60+ hours a week so school doesn't fit in too well.
52. I have a number of post secondary courses that I took however the BOE does not recognize the educational institute that I attended. It is frustrating that more credit is not provided or that courses are not acknowledged.
53. Time
54. Working in a small organization doesn't leave much time (if any) to pursue personal/professional development goals without impacting the little 'free time' that one has. I have so many other personal interests and responsibilities that I prefer not to spend my free time on municipal government.
55. I feel like it would be helpful to sit with someone to discuss what I have and what I would need. I have found the process to be somewhat confusing and haven't taken the time to really focus on

- what I need to do. This is very good timing though as I have always had the funding available and the support of my employer but haven't made the time. I am realizing the importance of working on my professional development should I wish to make any changes in my career path.
56. It would be great if courses could be held closer to the interior of BC - say Kelowna. It would save smaller interior municipalities on added costs for flights and transportation requirements.
Working in a relatively small municipality means that I am exposed to most facets of the organization. I have hesitated to "specialize" by taking the Statutory Administration certificate as I am unsure as to whether that option is the best one for my circumstance. The primary challenge is time constraints, working and raising a family. Very soon my time will come!
 57. Possible recognition from outside a strictly "municipal" type setting.
 58. I'm not educated enough on the BOE certification. Actually did not know it existed.
 59. Lack of clarity in the courses required for certification. Additionally I had a colleague that was quite a challenge in receiving certification as their bachelor degree education was from Europe - it did eventually get rectified but was quite painful to get there.
 60. I found the application process to be ambiguous and the equivalencies still confuse me....
 61. Not sure
 62. None. Currently enrolled in UVIC DLGM program and there are no immediate issues or concerns.
 63. I couldn't obtain my diploma in local government from Camosun College which is a requirement of my position so I had to start again through the University of Victoria. U of V gave me 4.5 credits for the certificate I obtained through Camosun so technically I'm starting from scratch which doesn't impress me.
 64. Seems to take a lot of courses to complete. Not in a hurry to complete the certificate. It seems to be geared towards managers and not general staff.
 65. The only challenge is that not all of the required courses are offered each semester so planning is essential.
 66. none
 67. Provide access to evening, weekend and on-line courses.
 68. Not sure
 69. finding accredited course offered in the interior of BC, University of Capilano does provide an excellent resource for further educational opportunities.
 70. As a First Nations Social Development Administrator, the caseload has increased over 10 year period and this job is not 9 to 5; it is 24/7: always on call.
 71. Equivalencies should not be tied to UVIC. There are other schools that offer high level local government training.
 72. Finding out about the BOE and then getting approval to take the courses from my employer (limited numbers are supported). Many people do not understand how the program works - misunderstanding between MATI and the BOE.
 73. length of career service left before mandatory retirement
 74. NA
 75. Just finding the time to complete the courses
 - 76.

77. The only challenges that I face are personal time constraints and possibly personal funding because whole my employer is very generous with education dollars there is still a limit to how much they will pay. Really none of the others on the list above were barriers at all.
78. There needs to be more Distance Education opportunities, like UVIC.
79. Not sure the whole process and who to ask for that information
80. the lack of requirement by local government
81. The process for professionals in field is very long and difficult to complete. The core requirement programs are only offered at certain times and those do not always match with an individual's schedule.
The majority of the future CAO/CFO etc are working in local government and have young families. It is very difficult to complete the lengthy certificate requirements; especially when many of the courses seem to be repetitive.
82. N/A
83. From what I have researched, the application process is not very difficult, the greater degree of hardship is the transferable credit concerns and the amount of post secondary courses being available. Further scholarship opportunities would also be valuable.
84. I would like to address the "lack of work experience", my number one challenge. It appears that there are lots of "experienced" people out there and my employer does not seem to feel the need to move me forward in the corporation. Also, when applying for other competitions in other municipalities, unless you have previous experience, your chances are minimal.
85. Have not tried to obtain a BOE certificate at this time.
86. I am currently working on a MPA with UVIC. My hope was to see how I might be able to concurrently explore the BOE Administration certification. However, the BOE website is difficult to interpret, information about course equivalency is very difficult to find, there appears to be no flexibility or clarity with respect to post-secondary cooperation when more than one path of study is desired.
87. Biggest obstacle was UVic not offering a required course last year, which was the only one left I needed. So I had to wait an extra year.
88. Although I have significant "equivalency" due to a senior level administrative career in federal government prior to working in a municipal environment, the requirements to obtain the certification effectively negate any opportunity to use that equivalency (24 months managerial experience in local govt in addition to the equivalency consideration.) Although I have been working toward my Public Admin Diploma steadily over the past few years since coming to work in the municipal environment, my current role is technically not considered "management" in the LG structure I am employed in, so even if I complete the core courses I will be hard pressed to obtain the BOE Administration certification. Despite an extension senior administrative background in my work history, without some kind of post secondary designation, I am generally precluded from being considered for "management" roles since "combination of education and work experience" has been dropped in favour of "degree / diploma / certification" requirements to be considered for positions.
89. Having a young family makes it difficult for me to be away to complete certain courses that may be week long. As well it is just a matter of time until I have enough years of work experience to qualify.
90. I'd like to do more courses more quickly. The fact I live in a very isolated RD means that I can only really afford to do a course one or maybe twice a year. If I could do this through a local college campus by a mix of distance ed and video conference, I could probably do the whole certificate in a year at minimal cost to my employer. Capilano is excellent, though!
91. I believe that the increase in time requirements for certificate completion a few years ago had a very severe dampening effect on my taking BOE programs.
92. Time constraints. I work long hours and it is difficult to study and write papers after a long day at

work.

93. Finding the time

94. At the time I was working toward my BOE certificate, only BCIT was offering the courses, then Capilano and Camosun, all of these were only at the technical or college level, and therefore my university education was not recognized. I found the lack of equivalency very frustrating and thoroughly appreciate the work that LGMA has put into the standardization process.

95. When I took my courses, they were mostly correspondence. I think there is more availability now but getting the information out is still an issue.

96. There are many different local government certificate and diploma programs out there. It is difficult to choose which one is the best for you. I chose a program that will give me the most opportunity to continue my education in the same field and the most flexibility for job opportunities.

97. The lack of "work relevant/related" on-line courses available that would count as my 8 additional courses.

98. None really - when I obtained it there were really no significant challenges other fitting the time in.

99. I have not gone through the application process.

100. I really don't have the time to take courses plus have a personal life/family commitments, etc. Also, I have to do some steps to get one institution to send transcripts somewhere for considerations, etc. - a rigamarole I don't have time for.

101. My challenge is that managerial experience is required for the certificate, yet it is not clear how to get that experience if you do not already hold a management position. It is not clearly defined. I think the BOE could provide some information how to meet that requirement - is management of a particular project enough?

102. I do not work in local government, it is not a requirement for my current or future career goals. I work in the BC Public Service and found the courses I took relevant for external education. However, I am ineligible for the BOE certificate as I do not work for a local government.

103. Funding for training is always a challenge during tough economic times yet employees are an organizations most valued asset and government needs to support appropriate education programs.

104. Funding for training is always a challenge during tough economic times yet employees are an organizations most valued asset and government needs to support appropriate education programs.

105. I had no major problems getting the Service Delivery Certificate, but the courses required for the Local Government Administration are not available at UNBC

106. I am not planning on obtaining a BOE certificate

Q17) Do you have any suggestions or feedback you would like to share with the Board of Examiners?

1. Any post-secondary university level courses should be considered for credit towards a BOE certificate.

2. Get the word out that employers should be requesting or ensuring employees move toward a certification. Employers are largely concerned with personal levels of certification that are necessary for a job. For example, Technologists have to personal association that they can belong to. Many employers insist that their employee is either; already a part of the association or is eligible for registration in the association as a requirement of the job.

3. How about a program where part of the senior certificate requirements could be completed, then, have a period of time to get the senior level position, then finish the certification process. This would help identify and encourage those who want to move forward in their careers - and it might

also help the smaller municipalities to hire administrators and other senior staff, because it would create a cohort who were looking to build up their experience.

- like to see a little more flexibility in the scholarship program for travel expenses, its very expensive for people from the interior to travel to some of the courses in the lower mainland and many small municipalities just don't have enough funding to help their employees. When its \$2800 to attend MATI and it requires plane fare, taxis, ferries to get to Bowen Island plus a week off work -and many have to take vacation time to attend, it is very onerous if you can't get a significant assistance.
- 4.
 5. Perhaps there should be an ability to obtain certification based on an evaluation of an individual's education/work experience without the requirement to take additional courses.
 6. n/a
 7. While I found the time committment related to the four Government Services courses was sometimes difficult, I was pleased with the content and felt the effort was very worth it. The classroom setting (Kelowna) wherein you got to interact with students from around the province was great. It would be nice if we could have the rest of the classes available in this format. thanks
 8. - streamline the application process to allow for better transfer of classes between institutions. I found the whole process very discouraging that left me rather angry.
 9. I am constantly aware of the Board of Examiners certification process through various local government associations and the IIMC associations -- when the time comes for me to complete my certification, I am hopeful that I will have the same experience as the first time - very satisfactory.
 10. keep up the good work!
 11. This is a very worthwhile program for people wishing a career in local government. Please maintain it is availability and continuity.
 12. I may have feedback once I have delved a little deeper into the process. I have been hesitant to date given my personal financial constraints.
 13. I've not answered some of the questions on the BOE as I'm in Human Resources and have focused my education and professional designation in Human Resources rather than the BOE.
 14. Scholarship funding was much appreciated by my employer and myself.
 15. The Capilano Law Course should be acceptable for credit in obtaining a local government admin certificate. It is challenging to take the UVIC law course and also the Capilano PADM Law course or to transfer the credit from UVIC to capilano for their certification program.
 16. Please keep at it as these programs will add significantly to the success that municipalities must attain into the future.
 17. I have frequently applied for the scholarships to cover my travel expenses. Living in the East Kootenays, I don't have any opportunities to attend the classes in person locally. I had to travel to Vancouver or Kelowna and yet each time the BOE did not allocate any funds for my travel assistance. I think the BOE needs to recognize these challenges in the remote areas of BC.
 18. I think this is important for development in the field. Ie for the applicants. It is not important to employers and no one could rely on it as a meaningful certification of competency in my view.
 19. na
 20. Consideration of more transferable courses that are applicable (e.g. from Capilano / UNBC / etc.)
 21. I found the process easy to follow - a lot of information on the web that is easily accessible. L. Hodge was also very helpful with scholarship application questions.
 22. Just keep up the good work. I think this is an excellent program, that is well recognized by employers.
 23. From the material posted on the website, the eligibility requirements are difficult to understand.

24. none.
25. none.
26. Local Government Administration cert should gear towards those trying to become managers... not those already in management.
27. None
28. I would like to see the BOE more closely aligned with Diploma's and Certificates in LG Administration programs at the various post secondary institutes around BC.
29. I know they are there.
30. The certification is a good alternative program, and is well recognized by most employer(s) if you do not have a diploma or degree in local government.
31. Reaching out to potential 'students' and candidates to certification should be done more proactively. It would greatly benefit local governments
32. No
33. Thank-you for your work/
34. Considered applying 15 years into my career, but was discouraged from doing so until I had more experience... never went back
35. requirements could be made clearer, particularly around equivalencies between Cap U and UVic
36. No.
37. A stronger acknowledgement towards recognizing 'on the job' as a qualifer in obtaining certificate and not solely focus on the 'classroom' aspect (course completion), etc.
38. Do they ever have a booth at the LGMA Convention like our pension corp does? You can book a time slot to discuss your personal situation. This might be a good time for me to be able to sit with someone to discuss or plot a path for the future.
39. I think that education options have improved greatly in recent history, with improved access to distance learning and limited requirements to attend a post secondary institution, speaking as someone who currently works full time and is raising a family. I also appreciate the recognition of work experience as part of the program as the familiar line..."I did not tell my Grade 2 teacher that when I grew up I wanted to be a Corporate Officer" is very true... local government employees come from varied backgrounds, educationally and professionally, which only serves to enhance their capabilities in my opinion, but which also often means that the formal education comes during or after local government employment has begun. The opportunity to continue working while obtaining valuable education to support that work is awesome.
40. Better messaging?
41. The BOE Certificate should be marketed as a professional designation with the attendant rigour of ongoing good standing assessment, existing educational/work experience standards and standards for ongoing professional development. I believe partnership with an association like LGMA could assist in bringing about a stronger perception of the value of BOE.
42. No
43. Have a "credible" University such as UVic develop and administer a program and allow applicable transfer credits from programs such as Capilano University and other post-secondary work apply. In order for this to have value it cannot be easy to obtain but there needs to be a recognition of past education and employment experience.

44. Not at this time.
45. I am having difficulty getting a list of courses that apply to the certification. Does attending MATI 1 count for credits?
46. no
47. No
48. I have 24 years of work experience with New Aiyansh Village Government, 13 years of work experience with Revenue Canada Taxation (@1166 West Pender, Vancouver to Sept 1987)) and have completed the PADM program and have one more MATI at Squamish; completed three Nisga'a Language Courses plus two credit Computer Courses at WWNI and still continuing with my education. I have 10 grandchildren, married 42 years, Residential School survivor; and should be retiring in 2013 (age 65)but I love my work and care about the clients, too much and always wonder if I can walk away. Currently, I am in the process of succession planning and definitely have my successor obtain PADM/MATI training courses.
49. It is great that you are revamping the information about the Board of Examiners certificates. I am taking courses that will provide credit toward these certifications and it will be great to have updated information.
50. Thank you for the scholarship received on my first course. It was a huge help and motivator to continue with the other courses.
51. I suggest combining this certificate program with the Local Government Administration certificate from Capilano University. That credential seems to be a bit more widely recognized and that's what I am currently working on
52. I much prefer the in-class style of the Capilano University Courses. One of the major reason taht I was given support to go is the networking and collaboration that occurs in those classes with others from other Local Governments. It is considered more than just an academic class...
53. NA
54. Please keep the scholarships going, it makes a big difference for local gov's when paying for employee education if a scholarship is also available for half.
55. I am pleased with the program. I think it is valuable and relevant. It gives employees and employers confidence. It recognizes achievement at the Provincial level. I was very glad about the "Service Delivery" option that was introduced for non-management staff like me.
56. better website with clearer information and someone to talk to about it.
57. I would like to see this include at the end of the Local gov program at Cap U possibly as a primer weekend as we all have papers we have submitted as part of the program.
58. My only feedback at this time is to thank the BOE for the program in itself. As a young, passionate local government employee I find that the BOE has real value in my career today, and in the future. I look forward to submitting my applications for each level of certification.
59. The courses I have taken through Camosun College were wonderful. I have learned so much about government administration in a variety of areas. I wonder if the Human Resource Depts. really understand the level of learning involved in a certificate program.
- Thanks for this opportunity.
60. If I were to try and obtain a certificate, I believe only some of my courses through UVIC would count towards the certificate, then I would have to enroll in another institution to complete the certificate. Extra hassle.
61. I think the best thing that could happen would be for the BOE to work with UVIC to build an MPA curriculum with a Local Government emphasis.
62. Consider that some positions in local government may not be defined as "management", but the activities carried out in those roles are generally those of managers in other work environments.

Consider equivalency in other jurisdictions along with experience generally in local government rather than placing a restriction on the kind of experience - for example, if an individual had management equivalency, and administrative experience (not necessarily in a management role) in local government allow them to qualify for the BOE Administration certification.

63. More one to one time with instructors should be explored for these programs.
64. As implied in 16 above, I believe they should programs that do not take 3 or 4 years to complete.
65. BoE should turn over the entire process to the LGMA, having the province involved is pointless. The certification should be by the professional association, just like other professional bodies (engineers, lawyers, accountants etc.)
66. New employees today aren't as interested in investing in themselves. I find it difficult to encourage them to grow. Perhaps an introductory one day seminar for the program would be helpful.
67. focus on the next generation and program delivery that is relevant to them - not me.
68. With respect to the Statutory Administration Certificate - 48 months of experience is considerably long. Once appointed, and any probation period (by the employer) has been successfully completed, the Certificate should be available.
69. A lot of people are completing the required core courses as part of a university or college degree/diploma and then plan to use them to apply for local government positions. The questions from this survey do not take into account those working towards the CORE courses to be able to apply later on. Thanks
70. See above.
71. Perhaps those who work with, but not in local government could apply for the certificate, such as provincial or federal government employees.
72. If the courses were available in Prince George, I would likely pursue the next certificate.
73. No