



Policy Title:	Councillors Assistants Policy
Policy Number:	PAC005
Report Number:	APA2003-55, PFC2013-0645
Approved by:	PFC (Formerly PAC and APAC)
Effective Date:	2003 Oct. 28 with amendments (Council) to 2013 Sept. 16.
Business Unit:	Office of the Councillors

BACKGROUND

At its meeting 2003 October 28, the Priorities and Finance Committee adopted the following policy from report APA2003-55. It was subsequently amended at Council 2010 June 22 and 2013 September 16.

PURPOSE

The Assistants Policy is intended to reconfirm and maintain the high ethical standards which are observed by Councillors and Assistants in the execution of their duties. The policy underscores the proper and ethical manner which is acceptable to Council and the citizens of Calgary in respect to these matters.

POLICY

General Guidelines

1. In respect to Assistants, this policy is meant to apply only where said Assistants are remunerated from funding provided under the terms of this policy (referred to as the 'Assistants Allowance').
2. The Assistants Allowance funds are to be used only for the purposes of hiring a person to act as Assistant in a direct employee/employer relationship between the employing Councillor and the Assistant.
3. There are two forms of "assistance" available to Councillors which are intended to assist or aid a Councillor in the execution of the office:
 - a. the engagement of a person (or persons) to act as an assistant on a full-time or part-time basis;
 - b. Specific projects or assignments on a one-time basis.
4. The Assistants Allowance under this policy must be used only in the performance of communications and administrative functions. It is not to be used to duplicate or augment existing City programs or to create new ones. (Refer to appendices c to g for Assistants job profiles)



5. Assistants hired hereunder shall not usurp or perform functions which are the prerogatives of elected office.
6. The Assistants Allowance is not to be used to provide a pecuniary benefit to the Councillor.
7. Implicit in this policy is the recognition that, to a great extent, Assistants are political appointments.
8. The Assistants Allowance may not be spent in contravention of this policy.
9. Council endorses the City of Calgary's "Respectful Workplace Policy" and hereby incorporates it as part of the Assistant's Policy by reference. (Council 2006 May 13)

Hiring Pre-qualifications - Assistants and Specific Project Contracts

1. At the time of hiring, an Assistant:
 - a. must be at least eighteen (18) years of age;
 - b. must be a Canadian citizen or a landed immigrant;
 - c. cannot possess a criminal record of an indictable offence conviction which is less than five years old;
 - d. cannot be on parole, probation or any other form of approved release from any penal institution.
2. In instances where an Assistant has been dismissed for cause, the individual cannot be hired again within the Office of the Councillors for the remainder of that elected term of office or for at least one year, whichever is the greater.
3. An individual holding an elected public office shall be ineligible for hire as an Assistant.
4. No Councillor may hire a relative or common-law spouse (as defined hereafter) as an Assistant.

No Councillor may hire a relative or a common-law spouse (as defined hereinafter) of any assistant under contract to them, under this policy, as an Assistant.



DEFINITIONS

5. Definition of:
 - a. **a relative** is the husband, wife, child, parent, brother, sister (including foster or step), or parent-in-law, brother-in-law, sister-in-law, daughter-in-law, son-in-law.
 - b. **a common-law spouse**: an adult who has lived in a relationship with another adult for a minimum period of one year, not contravening consanguinity restrictions, and recognized by the public as being in a “marriage-like” relationship.
6. In addition to the general rules, as previously outlined in the policy, specific project contracts shall not be granted to any person who is involved in litigation with The City of Calgary.

Duties and Limitations

1. Assistants shall not substitute for the Councillor at meetings of boards, commissions or committees to which the Councillor has been appointed by Council.
2. Assistants shall execute confidentiality/disclosure forms and abide by the confidentiality agreement comprising paragraphs 4 and 5 of the Assistant's contract.
3. Assistants shall only perform administrative and communications functions related to the employing Councillor.
4. Assistants shall be ineligible for selection by Council to boards, commissions, committees and authorities appointed by Council, but may accept appointments by bodies other than Council.

Tenure and Employment

1. The appointment of an Assistant shall be for a term not to exceed four years, and is renewable for further fixed terms not to exceed four years, subject to addition or deletion of terms as may be required by policy changes. However, in no case shall the contract extend beyond the term of the elected official, **except as specifically provided below.**
2. The Councillor shall have the option to hire directly or to use the resources of The City of Calgary in hiring an Assistant.



3. The contract of employment between a Councillor and Assistant shall be deemed to be a personal service agreement.
4. All Assistants shall be hired pursuant to the Assistants Policy - Office of the Councillors, and shall execute the agreement attached hereto as Appendix A or B, as appropriate, prior to commencement of employment.

Employment Contract

1. A written contract, including an Affidavit of Execution (Appendix "A" or "B"), and the provisions of the Employment Standards Code (Alberta) as amended, shall govern the relationship between the employing Councillor and the Assistant.
2. The Priorities and Finance (PFC) shall approve the basic form of the contract; however, the employing Councillor shall have the sole discretion in the matters relating to:
 - a. the selection of and hiring of assistants, subject to the prohibition of hiring of relatives and common-law spouses;
 - b. assignment of duties;
 - c. discipline and quality of work;
 - d. hours of work, subject to an average maximum of 37.5 hours per week.
3. Copies of the executed contract shall be provided to:
 - a. the employing Councillor;
 - b. the Assistant;
 - c. the Manager, Office of the Councillors.
4. Such contracts shall be between the Councillor and the Assistant, and are not an agreement with The City of Calgary.
5. In instances where two or more Councillors wish to employ the same person as an Assistant, a separate contract shall be entered into with each Councillor.
6. In the event that a Councillor contracts for a specific project to be undertaken within these guidelines, the Councillor shall in all cases, prior to the project being commenced, obtain an Executed Letter of Agreement (Appendix "B")



relative to payment thereof, which is to be filed in the manner described in these Terms of Reference.

7. In the event that a Councillor leaves office prior to the end of the Councillor's elected term, whether by resignation, retirement or some other reason, and either a by-election is called or there is a period of time before a municipal election that will determine who the new elected Councillor for that Ward office will be (the "Transition Period"), the Assistants in that Ward office may continue to perform their duties for the Ward office during the Transition Period so long as a new personal service agreement is signed between the Assistants and the Chair, Coordinating Committee of the Councillors Office ("CCCO"). The Chair, CCCO will become the employing Councillor of these Assistants for the duration of the Transition Period.

The new personal service agreement entered into between the Assistants and the Chair, CCCO will ensure continuity of service, pay and benefits for the Assistants during the Transition Period.

For clarity, the personal service agreement in this instance cannot extend beyond the Transition Period.

Once a new Councillor has been elected, either through a by-election or municipal election, and should the new Councillor wish to retain the current Assistants, then a new personal service agreement with the newly elected Councillor will be required.

Should an Assistant not wish to continue employment during the Transition Period the Assistant is entitled to any severance amounts owing as outlined in *Assistants Severance Policy* (CC030).

Benefits and Registered Retirement Saving Plan

1. Assistants Benefits – General

As part of compensation to Assistants the Office of the Councillors offers a benefits package. The matter of eligibility, waiting periods, employer/employee cost sharing arrangements, optional versus mandatory benefits and the details of each component of the plan are subject to amendment from time to time with the approval of PFC or Council as the case may be. The Manager, Office of the Councillors is responsible to keep a record of the Assistants Benefits Plan and provide information to Assistants on hire, when there are changes and on request.

Subject to the above, the following employee benefits are available to eligible Assistants:

- Group Life Insurance;
- Supplementary Health Insurance;
- Dental Plan;
- Short Term Sickness and Accident Plan; and
- Long Term Disability Benefits.

2. Assistants Benefits - Vacation Entitlement

Assistants earn vacation entitlement in accordance with The City of Calgary Management Exempt Policy Statement, Section 3010. Assistants are required to take earned vacation in accordance with the Employment Standards Code (Alberta) as amended. Vacation entitlements will be accounted for annually in December or upon termination, whichever occurs first. The Manager, Councillor Office Services is responsible to track paid vacation absences of Assistants for the purposes of the annual vacation entitlement accounting.

3. Assistants Benefits - Bereavement Leave

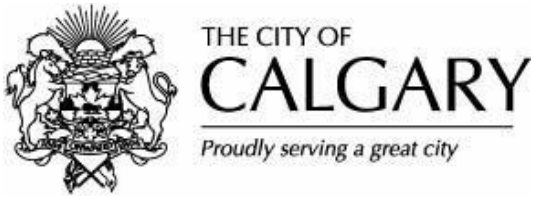
The employing Councillor may grant bereavement leave in accordance with the "Management Exempt Policy Statement" and at the expense of the office Bereavement Benefit account.

4. Assistants Benefits - Statutory Holidays

Assistants will be entitled to the same statutory holidays as The City of Calgary Management Exempt staff. In cases where the Office of the Councillors is open on a statutory holiday and the Assistant works at the request of the employing Councillor or the statutory holiday falls on the weekend, the Councillor is required to provide the Assistant with a day-off in lieu of the statutory holiday worked at some point within six months of the date of the holiday worked and to keep a record of this agreement with their Assistant.

5. Benefits- Registered Retirement Savings Plan

The Office of the Councillors also offers a matching Register Retirement Saving Plan to Assistants. Upon enrollment in the plan, the office matches contributions of the Assistant to the designated Group Registered Retirement Savings plan to a maximum of 7.5% of the salary or wages of the Assistant.



COUNCIL POLICY

Allocation of Funds

Each year, each ward will receive an equal allocation as approved by Council as part of the Legislative Budget- Office of the Councillors which amount is referred to as the 'Ward Based Budget Package'. In accordance with the Budgeting and Accounting - Office of the Councillors policy, each Councillor will have a budget for salaries of assistants which amount is the funding for this policy (the Assistants Allowance).

The Budgeting and Accounting - Office of the Councillors policy dictates many of the conditions of this funding. In addition, the following conditions also apply:

1. The annual allowance shall not include any sums payable by the Employer in respect of the following listed benefits:
 - a. Canadian Pension Plan;
 - b. Employment Insurance;
 - c. Vacation Pay;
 - d. Employer's portion of paid benefits under contract;
 - e. Bereavement Leave; and
 - f. Matching R.R.S.P. program.

These listed items are all budgeted for and administered by the Office of the Councillors on behalf of the Councillors to ensure common compensation elements and consistency of application thereof from ward to ward and to ensure statutory obligations of Councillors as employers are met.

2. No authorization for payment of monies to an Assistant shall be processed until a fully-executed copy of the employment contract has been filed with the Manager, Office of the Councillors.

Method of Payment

1. The following payment procedure is established for part-time or full-time Assistants:
 - a. All remuneration to Assistants employed under the terms of Employment Agreement, Appendix A hereto, will be paid on a bi-weekly basis.
 - b. Councillors employing Assistants on a salary basis (monthly, annually) must advise the Manager, Office of the Councillors , in cases where



- exceptions to the normal work pattern require a pay adjustment; in the absence of such advice, a regular bi-weekly pay will be processed.
- c. Councillors employing Assistants on a 'pay-as-reported' basis (i.e. per hour) must authorize and submit time logs to the Manager, Office of the Councillors, for each Assistant so remunerated on a bi-weekly basis. The Manager will ensure that each time log has been signed by the employee and authorized by the employing Councillor prior to approving and submitting them to Finance Department for payment.
 - d. Because there is an Employer/Employee relationship between Councillor and Assistant, payroll deductions are required under the Income Tax Act, Canada Pension Plan Act and Employment Insurance Act. Payroll will make authorized deductions and issue a cheque directly to Assistants every second Wednesday for wages or salary owed, after deductions, for work up to and including the Friday eleven days previous.
2. In the case of specific project contracts, Appendix B hereto. Councillors shall authorize and submit individual invoices to the Manager. The Manager will ensure that these invoices are authorized by the Chairman or Vice-Chairman of the Coordinating Committee of the Councillors Office prior to submitting them to Finance for payment.

Salary Administration

Assistants Policy Salary Administration (For the period 2013 March 1 to 2013 October 25)

Effective 2013 March 1, the Office of the Councillors will begin to transition from existing Assistants salary administration policies and corresponding Job Profiles and pay ranges to a new set. The new set are intended to implement the salary administration guidelines, Job Profiles, pay ranges and corresponding Career Ladder for the Assistants program as recommended by an independent Consultant in 2012.

During the transition period between 2013 March 1 and the end of the current term of office, 2013 October 25, each Councillor will be entitled to opt for Employment Agreements with their Assistant(s) based on either the existing salary administration policies and corresponding Job Profiles and pay ranges or the new set (both set out below). Commencing 2013 October 26 all Assistants Employment Agreements will support hiring and employment of Assistants by Councillors only on the basis of the new Assistants Salary Administration policies and corresponding Job Profiles, pay ranges and Career Ladder.



1. Current Salary Administration Policy

Subject to available ward funding each Councillor can hire Assistants, using the standard Employment Agreement as approved by Council, to positions as follows:

- i. Constituent Assistant Job Profile Appendix C, SP AAA – Grade NS7
- ii. Community Assistant Job Profile Appendix D, SP AAA – Grade NS7
- iii. Executive Assistant (Term) Job Profile Appendix E, SP AAA – Grade MS3

The relevant Job Profiles and Salary Plans for each of these positions are cited in columns two and three respectively in the table above. The Job Profiles are appended to this policy. The actual pay rates, as amended from time to time, are available from the Councillors Office Manager or on the Councillors Office SharePoint site.

Notwithstanding the above, a Councillor may, at their sole discretion, pay a Constituent Assistant or a Community Assistant at a pay rate above the range approved for that position provided the rate is within the Executive Assistants' grid. (Council 2007 February 26).

2. New Salary Administration Policy

Subject to available ward funding each Councillor can hire Assistants, using the standard Employment Agreement as approved by Council, to positions as follows:

- i. Executive Assistant Appendix F, Pay Grades AD 1, 2 or 3
- ii. Communications and Community Liaison Appendix G, Pay Grades EX1, 2, or 3

The relevant Job Profiles and Salary Plans for each of these positions are cited in columns two and three respectively in the table above. The Job Profiles are appended to this policy. The actual pay rates, as amended from time to time, are available from the Councillor Office Manager or on the Councillors Office SharePoint site.

For assistance in setting an Assistant's pay rate under the new Salary Administration Policy, Councillors should refer to 'Guidelines for Establishing an Assistants Pay Rate' also available from the Councillors Office Manager or on the Councillors Office SharePoint site.



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PROCEDURE

The implementation of the policy as provided in the policy statements.

AMENDMENTS

2006 May 13

2007 February 26

2009 June 22

2013 January 14

2013 September 16

2013 October 21 - Bylaw 40M2011 Discontinue the use of the title "Alderman" in favour of the title "Councillor"



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Appendix A

Assistants Policy - Office of the Councillors *Full or part time Assistants' Contact*

ASSISTANTS' CONTRACT

FULL OR PART TIME ASSISTANTS

SECTION VI

ASSISTANTS POLICY - OFFICE of the COUNCILLORS



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EMPLOYMENT AGREEMENT made effective as of the ____ day of _____, 20__.

BETWEEN:

COUNCILLOR _____

(Hereinafter called "the Councillor")

OF THE FIRST PART

- and -

_____, of the City of _____,
in the Province of Alberta.

(Hereinafter called "the Assistant")

OF THE SECOND PART

WHEREAS the Councillor is desirous of utilizing the services of the Assistant under the terms of the Assistants Policy - Office of the Councillors "Schedule A" attached hereto as:

___ Executive Assistant

OR

___ Communications and Community Liaison
(Check one or the other of the above position titles)

and the Assistant has agreed to provide such services;

AND WHEREAS the parties are agreed that:

a) The Assistant will work an average of _____ hours bi-weekly,

OR

b) The Assistant will work hours as directed by the Councillor and submit to the Councillor, bi-weekly, time sheets reflecting the actual hours worked during the preceding bi-weekly period.

[Circle a) or b) above]



AND WHEREAS the parties wish to provide terms and conditions for the employment of the Assistant by the Councillor;

NOW, THEREFORE, IN CONSIDERATION of the hereinbefore recited premises and the mutual covenants of the parties hereto **THIS AGREEMENT WITNESSES THAT THE PARTIES HERETO AGREE AS FOLLOWS:**

1. The term of this Agreement will be for a period not to exceed four years commencing on the _____ day of _____, A.D. 20__, and terminating on the _____ day of _____, A.D. 20__. At the sole discretion of the Councillor, by notice in writing, this Agreement may be renewed for a further fixed term not to exceed four years on the same terms and conditions but subject to the addition or deletion of provisions as may be required by policy changes. However, in no case will the term of this Agreement extend beyond the Councillor's term of office.
2. The Councillor shall remunerate the Assistant for services rendered at the rate of _____ dollars _____ cents (\$_____) per hour, payable on a bi-weekly basis during the term of this Agreement. Any increase to the rate of pay will be based on satisfactory performance of duties, as determined by the Councillor, and in accordance with the Assistants Policy - Office of the Councillors.
3. The Assistant, in providing services, shall abide strictly by the terms of the Assistants Policy - Office of the Councillors which is attached hereto as Schedule A and made a part of this Agreement.
4. Any and all information provided to the Assistant in connection with this Agreement will be considered to be confidential and may only be used as is necessary to carry out the services to be provided. All reports, notes, maps, drawings photographs, data, forms and other records prepared by the Assistant hereunder will be the property of the Councillor.
5. Without limiting the foregoing but for greater clarity, no information or document is to be disclosed or released to any member of the news media or any other person not an employee of the City unless prior authorization is provided by the Councillor or the Manager Office of the Councillor.
6. The Assistant hereby agrees to defend, indemnify and hold harmless the Councillor, as well as The City of Calgary and all of its employees or authorized representatives, from and against any and all suits, actions, legal or administrative proceedings, claims, demands, damages, liabilities, interest, costs and expenses of whatsoever kind or nature (including reasonable legal fees), whether arising before or after completion of the services hereunder, to the extent caused, occasioned or contributed to in whole or in part, by reason



of any wilful misconduct, or bad faith of the Assistant in connection with or incidental to the performance of this Agreement.

7. This Agreement may be terminated by either party at any time prior to the end of the term in accordance with this section.
 - a) In the event of any conduct on the part of the Assistant that constitutes cause for dismissal, no prior notice is required.
 - b) The Employee should provide at least two (2) weeks notice in writing to the Councillor if the Employee intends to terminate this Agreement.
 - c) The Councillor may terminate this Agreement upon notice in writing to the Employee. This Agreement will also terminate if the Councillor:
 - does not renew the Employment Agreement;
 - resigns;
 - is defeated in a municipal election;
 - is forced from office; or
 - dies while in office.

In any of these events, the Employee will be entitled to prior notice in writing, or compensation in lieu of notice, or a combination of notice and compensation, that is equivalent to the greater of what is provided in the Employment Standards Code of Alberta (which may be referred to as the "ESC") or what is provided in the Councillors' Assistants Severance Policy as amended. A copy of such policy is attached and marked as Schedule B to this Agreement.

8. This Agreement embodies the entire agreement between the Assistant and the Councillor. No additional charges, amendments or modifications of any of the terms or conditions of this Agreement will be valid unless reduced to writing and signed by both parties.
9. a) No action at law or in equity may be commenced or continued on any matter arising out of or connected with this Agreement in any other court than a court of competent jurisdiction of the Province of Alberta or on appeal to the Supreme Court of Canada from the appropriate court of the Province of Alberta.



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- b) This Agreement will be subject to and construed in accordance with the laws in force in the Province of Alberta.

10. If either party desires to give notice to the other party under or in connection with this Agreement, such notice may be given as follows:

- a) by the Councillor to the Assistant if personally delivered at work or at:

or

sent by postage prepaid mail addressed to the Assistant at the above address.

- b) by the Assistant to the Councillor if delivered to the Manager, Office of the Councillors, 3rd Floor, City Hall, 700 Macleod Trail S.E., Calgary, Alberta or if mailed postage prepaid and addressed:

The City of Calgary
P.O. Box 2100
Postal Station "M"
Calgary, Alberta
T2P 2M5
Attention: Manager, Office of the Councillors (#8001)
Fax No.: (403) _____

Either party may change its address for the notices by a notice given as herein provided. A notice which is mailed will be considered as having been given at such time as it would in the ordinary course of mail be received by the party to which it is directed.

IN WITNESS WHEREOF the parties hereto have executed this Agreement.

SIGNED, SEALED AND DELIVERED

Witness:

Witness:

Councillor's Signature

Assistant's Signature



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CANADA PROVINCE OF ALBERTA

I, of the City of Calgary, in the province of Alberta and make oath and say:

To Wit:

1. That I was personally present and did see the "Councillor" and "Assistant" named in the attached instrument, who are personally known to me to be the persons named therein, duly sign and execute the same for the purposes named therein.
2. That the same was executed at The City of Calgary in the Province of Alberta and that I am the subscribing witness thereto.
3. That I know the said "Councillor" and "Assistant" and they are in my belief of the full age of eighteen years.

SWORN at the City of Calgary in the Province of Alberta

this _____ day of _____, A.D. 20__

Before me,

A Commissioner for Oaths in and for the Province of Alberta.



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Appendix B

Assistants Policy - Office of the Councillors

SPECIFIC PROJECT CONTRACT

COUNCILLORS' ASSISTANCE

SECTION VI (7)

ASSISTANTS POLICY - OFFICE OF THE COUNCILLORS



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COUNCIL POLICY

AGREEMENT made effective as of the ____ day of _____, A.D. 20__.

BETWEEN:

COUNCILLOR _____

(Hereinafter called "the Councillor")

OF THE FIRST PART

- and -

_____ of the City of _____,
in the Province of Alberta,

(Hereinafter called "the Assistant")

OF THE SECOND PART

WHEREAS the Councillor is desirous of utilizing the services of the Assistant for the purpose of providing Councillor services as requested.

AND WHEREAS the Assistant has agreed to provide such services;

NOW, THEREFORE, IN CONSIDERATION of the hereinbefore recited premises and the mutual covenants of the parties hereto **THIS AGREEMENT witnessed THAT THE PARTIES HERETO AGREE AS FOLLOWS:**

TERMS OF REFERENCE:

1. The Assistant shall provide the following services for the Councillor:

Assisting Councillor _____ on the following dates:

Start Date: _____

End Date: _____

For a total of ____ **@** ____ **hours per day**
____ **hours in total**

Duties:

2. The services as set out in paragraph 1 above shall commence on the _____ and terminate on the ____ day of _____ A.D. 20__.



3. The Councillor shall remunerate the Assistant for services rendered at the rate of \$_____/hr payable on a invoice basis during the term of this Agreement, PROVIDED HOWEVER, that the total amount payable under this Agreement shall not exceed the sum of _____ .
4. Neither this Agreement, nor the method of carrying out the terms of same shall, in any sense, be construed so as to create the relationship of employer and employee between the Councillor, or The City of Calgary and the Assistant.
5. It is understood and agreed that no benefits which employees of The City of Calgary receive will apply and no deductions will be made for benefits, Short Term Sickness and Accident Benefits, Long Term Salary Continuance, Group Life Insurance, Benefit Society Dental Plan or Local Authorities Pension Plan and further that no deductions will be made for Income Tax, Canada Pension Plan and Employment Insurance.
6. The Assistant shall be responsible for and shall pay all taxes, rates, assessments and premiums as may be required to be paid by reason of this Agreement, by any federal, provincial or municipal law, and the Assistant shall indemnify and save harmless The City therefrom.
7. No vacation time or vacation benefits shall accrue to the Assistant.
8. Any and all information provided to the Assistant in connection with this Agreement shall be considered to be confidential and shall only be used as is necessary to carry out the services to be provided.
9. All reports, notes, maps, drawings, photographs, data, forms and other records prepared by the Assistant hereunder shall become the property of the Councillor.
10. Without limiting the foregoing but for greater clarity, no information or document is to be disclosed or released to any member of the news media or do any other person not an employee of the City unless prior authorization is provided by the Councillor or the Manager, Office of the Councillors.
11. This agreement may be terminated for cause by the Councillor at anytime.
12. This agreement embodies the entire agreement between the parties and the parties shall not be bound by or liable for any statement, representation, promise, inducement or understanding of any kind or nature not set forth herein. No additional charges, amendments or modifications of any of the terms or conditions of the Agreement shall be valid unless reduced to writing and signed by both parties.



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IN WITNESS WHEREOF the parties hereto have executed this Agreement.

SIGNED, SEALED AND DELIVERED

Witness:

Councillor's Signature

Witness:

Assistant's Signature



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COUNCIL POLICY

SPECIFIC PROJECT CONTRACT – I N V O I C E

Invoice # _____

Date: _____

TO: **COUNCILLOR** _____

P.O. Box 2100, Stn "M" (#8001)
Calgary, AB T2P 2M5

FROM:

SUBJECT: SPECIFIC PROJECT CONTRACT

For Councillor's Assistance rendered:

Dates: _____
To

<i>Rate per hour</i>	\$
<i># of hours</i>	
<i>Sub-Total payable</i>	\$
<i>GST(#)</i>	
<i>Total payable</i>	

Signature of Assistant

Signature of Councillor for Approval



Appendix C

Assistants Policy - Office of the Councillors Job Profile, Constituent Assistant

JOB PROFILE - CONSTITUENT ASSISTANT

(Approved by APAC 2003 October 28)

POSITION SUMMARY:

The **Constituent Assistant** assists constituents in their dealings with the Councillor and the City administration.

NATURE & SCOPE OF THE POSITION:

The Constituent Assistant is accountable to the Ward Councillor to serve as a liaison between the Councillor's ward office, constituents, the general public and the City administration. The Constituent Assistant responds to inquiries and complaints from ward constituents on behalf of the Councillor by using her/his knowledge of the City administration to inform, refer or assist the constituent.

DUTIES & RESPONSIBILITIES:

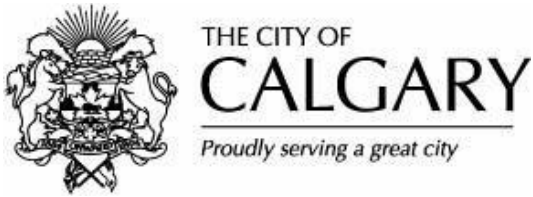
Within the scope of the ***Assistants Policy, Office of the Councillors***, the Constituent Assistant's job duties and responsibilities broadly encompass the following major functional areas:

Constituent Contact Management

The Constituent Assistant serves as a liaison between the Councillor's office and constituents, members of the general public and the city administration.

The Constituent Assistant is involved in responding to a high volume and broad range of public inquiries of varying complexity that are directed to the Councillor's office. These concerns and complaints require the development of an appropriate strategy that includes a determination as to who should be referenced or consulted; working in a collaborative manner with members of the Administration in order to ensure that the issue is fully and satisfactorily addressed; and keeping the responsible Councillor informed of developments and progress in responding to the inquiries.

In this regard, the Constituent Assistant may draft letters or emails regarding concerns of constituents for approval of the Councillor or Executive Assistant as specified by the Councillor.



COUNCIL POLICY

Provides support to the Councillor prior to meetings with constituents, administration personnel or members of the general public through briefings on the background and current status of the issue to be discussed.

Administrative

Receive and assist callers and visitors to the office. Review and action ward phone messages and email.

Maintain a record of constituent and general public contacts and follow-up with the administration to ensure each is responded to in a timely manner.

Under the direction of the Councillor or Executive Assistant, as specified by the Councillor, the Constituent Assistant may also be responsible to open and sort correspondence, file ward records, log telephone calls, maintain a ward web site and/or other sundry duties as assigned.

Miscellaneous

Special assignments as requested by the Councillor.

Other duties as assigned which relate to constituent contact and/or daily ward administrative operational matters.

If requested by the Councillor, act as Executive Assistant during short-term absences of the Executive Assistant such as vacation or illness.

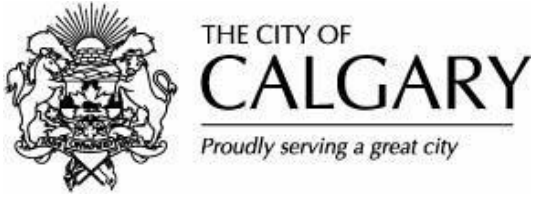
ORGANIZATION STRUCTURE:

The Constituent Assistant is accountable to the Councillor but may report to either the Councillor or Executive Assistant as specified by the Councillor.

Subject to the ***Assistants Policy - Office of the Councillors***, the Councillor is responsible for establishing work priorities, standards of performance, terms and conditions of employment and, within the context of this job profile, for defining the parameter of job responsibility.

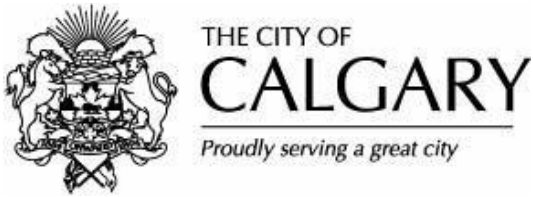
QUALIFICATIONS:

The Constituent Assistant must be self-motivated with excellent interpersonal skills and good organizational and communication skills. These skills would normally have been acquired through the completion of high school, combined with several years of business-related experience acquired in the public or private sector in a communications or public relations capacity.



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In addition, the Community Assistant must be able to demonstrate working knowledge of office computer systems and the ability to acquire knowledge of City organizational structure, programs, and services and be familiar with and understand the issues that affect Calgary's municipal government.



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Appendix D

Assistants Policy - Office of the Councillors Job Profile, Community Assistant

JOB PROFILE - COMMUNITY ASSISTANT

(Approved by APAC 2004 October 28)

POSITION SUMMARY:

The **Community Assistant** develops and maintains working relationships with organizations and agencies in the ward to facilitate communication between the ward office and these groups.

NATURE & SCOPE OF THE POSITION:

The Community Assistant is accountable to the Ward Councillor to act for the ward in relation to community involvement. The Community Assistant takes initiative to inform the community regarding City and ward developments, events and issues. The Community Assistant must develop and maintain knowledge regarding City activities, developments, issues and events in each community in the ward.

DUTIES & RESPONSIBILITIES:

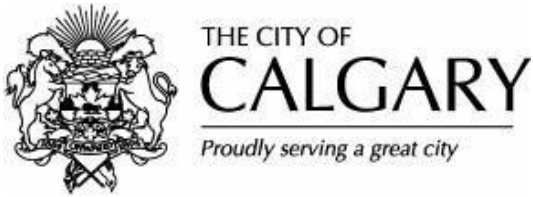
Within the scope of the ***Assistants Policy, Office of the Councillors***, the Community Assistant's job duties and responsibilities broadly encompass the following major functional areas:

Public Relations

Develop and maintain good working relations with key organizations and agencies within the ward. For example: community associations, City of Calgary district and area offices, lobby groups, developers, and editors and publishers of community newsletters. The Community Assistant uses these relationships to facilitate communication among stake holders interested in significant works, events or issues happening in a given community.

Plan and prepare in support of attendance by the Councillor at community association and other meetings in the ward. Assist with arrangements, provide briefing notes relating to key issues and attend the function if requested.

Work with office staff and Executive Assistant to co-ordinate attendance of the Councillor to speak as Deputy Mayor or ward Councillor at City or ward functions.



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This involves ensuring a file containing background and logistical information, contact name, speaking notes and other relevant details is available to the Councillor in a timely manner.

Communications

Suggest content for community or ward newsletters. Work with Administration to draft content. On approval of articles by the Councillor, work with Administration staff on the production and distribution of ward newsletters.

Work with City administration staff to arrange open houses within the ward as directed by the Councillor. Ensure facilities, equipment and services are booked as required. Suggest topics of interest to the community. The Councillor may also require the Community Assistant to attend the event to assist with hosting.

Draft correspondence to community associations, lobby groups, agencies and other organizations for the signature of the Councillor.

Assist individuals by putting them in touch with their community association or other organizations where appropriate.

Administrative

Maintain lists of names and contact details of presidents and members of community associations and other agencies or organizations in the ward. Maintain lists of names and contact details of editors and publishers of community newsletters.

Under the direction of the Councillor or Executive Assistant, as specified by the Councillor, the Community Assistant may also be responsible to open and sort correspondence, file ward records, log telephone calls, maintain a ward web site and/or other sundry duties as assigned.

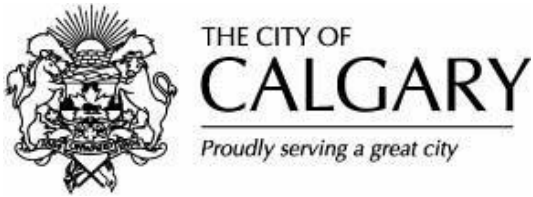
Miscellaneous

Special assignments as requested by the Councillor.

If requested by the Councillor, act as Executive Assistant during short-term absences of the Executive Assistant such as vacation or illness.

ORGANIZATION STRUCTURE:

The Community Assistant is accountable to the Councillor but may report to either the Councillor or Executive Assistant as specified by the Councillor.



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Subject to the ***Assistants Policy - Office of the Councillors***, the Councillor is responsible for establishing work priorities, standards of performance, terms and conditions of employment and, within the context of this job profile, for defining the parameter of job responsibility.

QUALIFICATIONS:

The Community Assistant must be self-motivated with excellent interpersonal skills and good organizational and communication skills. These skills would normally have been acquired through the completion of high school, combined with several years of business-related experience acquired in the public or private sector in a communications or public relations capacity.

In addition, the Community Assistant must be able to demonstrate working knowledge of office computer systems and the ability to acquire knowledge of City activities, developments, issues and events in each community in the ward.



Appendix E

Assistants Policy - Office of the Councillors Job Profile, Executive Assistant

JOB PROFILE - EXECUTIVE ASSISTANT (TERM)

(Approved by AOCC 2006 November 22)

POSITION SUMMARY

The **Executive Assistant (Term)** performs a broad range of research, advisory, public relations and administrative support functions designed to assist the Councillors in the fulfillment of their responsibilities as elected representatives of The City of Calgary.

NATURE & SCOPE OF THE POSITION

The Executive Assistant is accountable to and performs duties as directed by the Ward Councillor to ensure the efficient and effective administration of the Councillor's office. The Executive Assistant provides research services to the Councillor, serves as an information resource and acts as a liaison on municipal and ward-related matters between the Councillor and constituents, members of the general public and the media.

DUTIES & RESPONSIBILITIES:

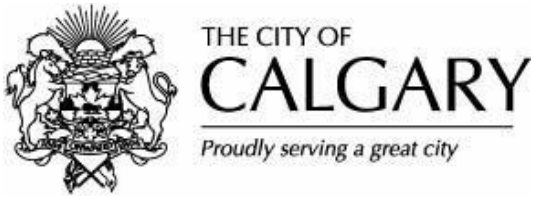
Within the scope of the ***Assistants Policy, Office of the Councillors***, the Executive Assistant's job duties and responsibilities broadly encompass the following major functional areas:

Research and Investigation:

The Executive Assistant undertakes research and investigation on behalf of the Councillor related to municipal government issues being addressed by Council and its Committees, or that may be relevant to the communities represented in the Councillor's ward.

Reviews and analyses agendas and reports to Council, Council committees, boards, task forces and agencies. Identifies items that may impact the Councillor or his/her ward. Recommends and initiates necessary action to respond to these matters.

This research and investigation may involve reviewing historical records and administrative documents germane to a specific issue, or acquiring additional information on public and community views concerning the matter for review and



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consideration by the Councillor. This work is undertaken in order to assist the Councillor in formulating a policy position with respect to the issue that may subsequently be presented or outlined by the Councillor in a public forum (i.e., Council, Committee, Community Association meeting).

Ward Budget Responsibilities

Under the direction of the Ward Councillor, the Executive Assistant manages the ward budget. The Executive Assistant then works with the Manager, Office of the Councillors, and office staff to monitor the ward budget to ensure all aspects are maintained within approved limits and all expenses are in accordance with office policy and acts in an advisory role to the Councillor on ward expenses.

Supervisory

The Executive Assistant supervises other employees of the Councillor including: Constituent Assistant, Community Assistant, Administrative Assistant and/or Summer Students and contract staff. Establishes work priorities, standards for their performance and assists them in resolution of difficult or multi-faceted issues. Schedules work flow; approves draft emails/letters regarding constituent/community concerns, follows-up to ensure responses are completed in a timely manner and ensures the Councillor is apprised of serious situations and items of political or policy significance. Required to maintain timesheets and provide Assistant Manager Employee attendance records.

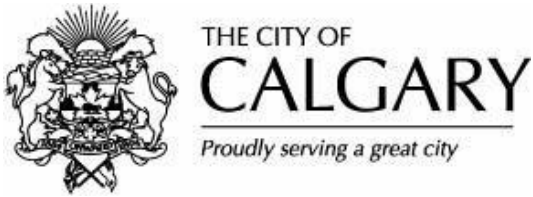
Advisory and Consultative

The Executive Assistant serves in an advisory capacity for the Councillor on contentious municipal or Ward issues. The Executive Assistant must be well informed and knowledgeable in relation to these issues by keeping abreast of Committee and Council deliberations and media reports concerning these matters, and through maintenance of strong and effective communication links with key Community Leaders, Civic partners, City Administration and other levels of government.

Ward, Constituent and Media Liaison

The Executive Assistant is the first critical point of contact and serves as a liaison between the Councillor's office and constituents, members of the general public, the media, City Administration and other levels of government.

The Executive Assistant is involved in responding to a high volume and broad range of public inquiries of varying complexity that are directed to the Councillor's office. These concerns and complaints require the development of an appropriate strategy that includes a determination as to who should be referenced or



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consulted; working in a collaborative manner with members of the Administration and outside agencies in order to ensure that the issue is fully and satisfactorily addressed; and keeping the responsible Councillor informed of developments and progress in responding to the inquiries.

The Executive Assistant may also work with other Members of Council, their staff, and staff of the Mayor's Office at the direction of the Councillor.

Public Relations

The Executive Assistant is required to organize and attend special ward events including: Open Houses, Community Ward Advisory Meetings, Town Hall meetings and other special events. The Executive Assistant must make arrangements for the Councillor's attendance at events not organized by the ward office such as public functions, community association meetings and special events. The Executive Assistant is also involved with the preparation of speeches, presentations and event planning. The Executive Assistant may be required to attend, or, accompany the Councillor at public functions, Annual General Meetings or large social events for the purpose of recording, opinion gathering and assisting in the resolution of issues. In some cases may represent the Councillor if he or she is unavailable.

The Executive Assistant may create, maintain or act as the liaison with the Website Coordinator to update and maintain the Councillor's website.

Administrative

Under the direction of the Ward Councillor the Executive Assistant manages the administrative activities of the Councillor's office. Reviews and prioritizes all correspondence and activities to determine which items necessitate direct involvement by the Councillor and identifies appropriate resources.

The Executive Assistant ensures the Councillor is apprised of serious situations and items of political or policy significance. This includes the handling of a high volume of calls, emails and mail consisting of inquiries of various complexities. Maintains a comprehensive filing system and logs all telephone calls and constituency complaints and/or inquiries. The Executive Assistant composes letters, speeches, reports and articles for community newsletters. The Executive Assistant is required to authorize, manage and schedule the Councillor's time and commitments, arrange meetings, keep daily calendar, and attend meetings with the Councillor as requested. The Executive Assistant records and distributes minutes of meetings.



The Executive Assistant monitors progress regarding Notices of Motion, instructions and requests for information made by their Councillors at Council or Committee of Council meetings.

The Executive Assistant researches, writes and prepares articles for Ward Reports, coordinates the printing and distribution of these reports to residents of the ward.

Records Management

The Executive Assistant manages and operates all records in accordance with the Freedom of Information and Protection of Privacy Act within the ward office on behalf of the Councillor. Processes requests of disclosure made to the ward office by the Office of the Information and Privacy Commission. Is required to operate effective protection of privacy function for the ward office and maintain disposal/destruction schedules in accordance with the Act.

Miscellaneous

Special assignments of interest or issues as requested by the Councillor.

ORGANIZATION STRUCTURE

The Executive Assistant reports directly to their respective Councillor within the context of this job profile.

QUALIFICATIONS

The Executive Assistant must be self-motivated, be aware of personal presence, work priorities and maintain confidentiality together with a constant and developing performance of duties. Must have a sound knowledge of The City of Calgary's organizational structure, programs and services, be familiar and understand the issues that affect Calgary Municipal Government, the City of Calgary Procedure Bylaws and understand the Municipal Government Act as set out by the Province of Alberta. Must also have a thorough knowledge of the organizations operating within the ward such as Community Associations and Home Owner's Associations.

In addition, the Executive Assistant must demonstrate well-developed administrative, computer and organizational skills; must be analytical and have strategically thinking and planning skills. Must have a well-developed network of internal and external contacts and the ability to foster and maintain relationships, dealing effectively with all levels of administration, staff agencies and other levels of government. Maintain the daily operations of an office; must have superior communications skills (verbal and written). Must have the ability to work in



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complex, unstructured situation with minimal supervision while demonstrating a high level of initiative, good judgment, high degree of sensitivity and adaptability to ensure the goals and objectives of the Councillor are effectively met to respond to public and ward concerns.



Appendix F

Assistants Policy - Office of the Councillors Job Profile, Executive Assistant

JOB PROFILE – EXECUTIVE ASSISTANT

(Approved by Council 2013 January 14 and as amended 2013 September 16)

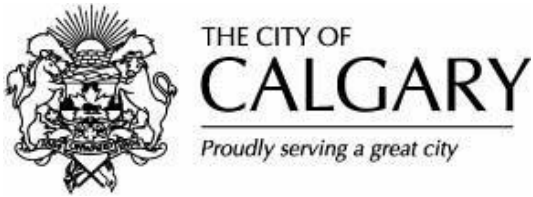
The following job description describes a skill-set that may or may not be utilized by each Councillor. Depending on a Councillor's resource requirements, this job description may not be required, or filled by one or more staff members.

POSITION SUMMARY

Reporting to the Ward Councillor, the **Executive Assistant** is responsible for assisting the Councillor with a range of administrative support functions in order to support the Councillor in the fulfilment of his/her responsibilities as an elected representative of the City of Calgary.

DUTIES and RESPONSIBILITIES - may include:

- Member of a collaborative Councillor's team
- Respond to inquiries or refer those inquiries to the Councillor or appropriate resource
- Manage the scheduling and rescheduling of the Councillor's appointments
- Review Councillor's calendar for upcoming events and ensure necessary preparation is completed, such as gathering necessary meeting materials
- Receive, log, and file all correspondence, reports etc. received by Councillor
- Prepare standard e-mail and letter responses for Councillor's sign-off
- Conduct basic research and information gathering as required
- Prepare reports as required inter alia: ward finances, gifts received, visitors to the office
- Provide support to other Councillor's members as required
- Other related duties as assigned by Councillor



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QUALIFICATIONS

Ideally, incumbents into this role will have formal certification or course work in administration, three or more years of previous experience and a strong understanding of computer systems and standard office software. Depending on the needs of the Councillor, candidates with alternative qualifications may be considered.

PLACEMENT OF INCUMBENT IN ROLE

It is understood that Councillor will have diverse philosophies on Ward administration and Councillor resource management. As well, over time Councillor's resource needs may evolve or availability of qualified candidates may vary. The following descriptions differentiate Councillor's Executive Assistant roles that require progressively greater knowledge, experience, skills, responsibility and complexity.

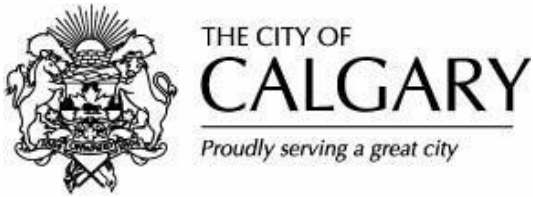
The intent of the Career Ladder below is to provide guidance to Councillor when placing employees into the role of Councillor's Executive Assistant. The following level-of-work definitions allow Councillor to: a) hire incumbents for a fixed set of responsibilities not anticipated to change over time; or b) hire a junior employee with the base qualifications of a university degree and progress these individuals as their skills, knowledge and contribution grows; or c) hire experienced employees that have education, knowledge and skills developed after many years of related work.

First, Councillor should review both possible job descriptions, Councillor's Executive Assistant or Councillor's Community and Communications Liaison and select the core function which best meets the needs of the role being filled. Second, given the qualifications of the employee and expectations of the role select the most appropriate level of work on the Career Ladder. Third, determine an appropriate salary within the relevant pay range that best represents the employees level of development, contribution and performance within the level of work selected.

EXECUTIVE ASSISTANT CAREER LADDER

LEVEL 3

This is the senior level of the Executive Assistant career stream. The primary focus of this role is to independently provide a broad range of basic, complex and/or specialized administrative support functions. In addition to basic duties described in lower level positions, this level is expected to independently coordinate and prioritize a range activities and provide senior level administrative support. As a senior



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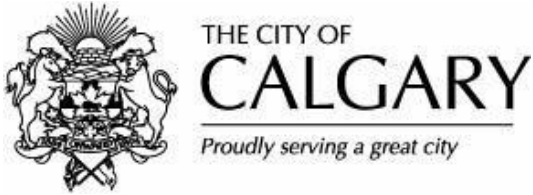
generalist, this role is expected to independently manage a wide range of administrative tasks, requests and anticipate issues. A key element of complexity at this level is related to the scope/depth of the area/specialty, sensitivity, and potential business impact of task. The impact of the role is typically confined to the work area or business unit but may have implication beyond. Qualifications: Advanced knowledge of: related office software; company databases; company structure and standard operating procedures; and/or office communications technology and five or more years of related experience.

LEVEL 2

This is a fully qualified level of the Executive Assistant stream. The primary focus of this role is to independently accomplish a broad range of basic administrative support tasks. Typical tasks may include: data entry, correspondence preparation, vacation tracking, time/labour tracking, calendar/meeting/travel administration, reception, sorting and distribution of mail, etc. Focus may be on one or more basic tasks, with some ability to prioritize work or choose from a number of known options to solve problems or complete tasks. Decision making is closely guided by past practice, guidelines and/or incumbent has easy access to guidance or supervision. Qualifications: Related formal course work and three or more years of related experience. Depending on the requirements of the Councillor, the incumbent may exceed these qualifications however; the scope and complexity of the work may limit further advancement.

LEVEL 1

This is the entry level of the Executive Assistants career stream. The primary focus of this role is to accomplish a range of basic administrative support tasks. Typical tasks may include: data entry, sorting and distribution of mail, reception, calendar management, etc. Focus is on achieving very specific objectives, duties typically consist of a limited number of repeated tasks. Decision making is closely guided by guidelines and/or incumbent has immediate access to guidance or supervision. Provided procedural steps are followed, the impact of the role is typically confined to the immediate work unit and may result in minor delays in processing administrative tasks. Qualifications: Working knowledge of computer systems and office procedures, incumbent is expected to learn and grow in the role. Depending on the requirements of the Councillor, the incumbent may exceed these qualifications however; the scope and complexity of the work may limit further advancement.



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Appendix G

Assistants Policy - Office of the Councillors Job Profile, Communications and Community Liaison

JOB PROFILE –COMMUNICATIONS AND COMMUNITY LIAISON

(Approved by Council 2013 January 14 and as amended 2013 September 16)

The following job description describes a skill-set that may or may not be utilized by each Councillor. Depending on a Councillor's resource requirements, this job description may not be required, or filled by one or more staff members.

POSITION SUMMARY

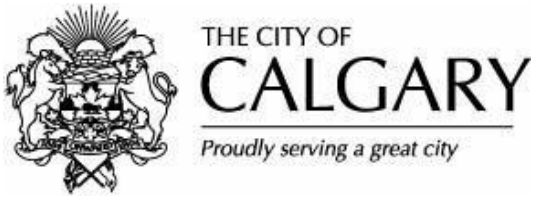
Reporting to the Ward Councillor, the **Communications and Community Liaison** assists Ward constituents in their dealings with the Councillor and the City administration and develops and maintains working relationships with organizations, agencies and individuals in the Ward to facilitate communication between the Ward office, the City of Calgary and other related stakeholders.

DUTIES and RESPONSIBILITIES

- Member of a collaborative Councillor's team
- Respond to inquiries and complaints from Ward constituents on behalf of the Councillor by using incumbent's knowledge of the City administration to inform, refer or assist the constituent.
- Serves as a liaison between the Councillor's office and constituents, members of the general public and City administration
- Manage or coordinate a broad range of public inquiries and issues may include:
 - prioritise issues and requests in terms of urgency, sensitivity and complexity
 - develop and recommending appropriate issue strategies
 - identify stakeholders and inform, collaborate, or transfer responsibility with the intent of successful issue resolution
 - track issues and following-up to ensure resolution



- provide Councillor with ongoing issue research and updates, as required
- receive, log, and file all correspondence, reports etc. received by Councillor
- Community involvement and communication may include:
 - develop understanding of community issues, organizations, agencies and Ward contacts
 - draft Councillor communications - examples, management minutes, letters, reports, speeches, newsletter, social media, etc.
 - monitor Ward related communication in media, social media, etc.
 - coordinate and draft Ward communication using methods preferred by Councillor which may include traditional and/or internet-based methods
 - provide content and technical support for web-based communication
 - attend community meetings with Councillor or as Councillor's representative in order to gather or relay information
 - identify new/emerging issues or events requiring the Councillor's attention or attendance
 - plan and coordinate communication activities such as open houses within the Ward
 - coordinate the Councillor's availability to stakeholders or function attendance
- Research and gather information may include:
 - researching and reporting on issues as determined by Councillor
 - provide Councillor briefing documentation for council or Ward meetings/issues
 - track notice of motions submitted by Councillor
- Other duties as assigned by Councillor



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QUALIFICATIONS

Ideally, incumbents in this role will have a related university degree or equivalent knowledge and experience. In addition, incumbents must be self-motivated with excellent interpersonal skills and good organizational and communication skills. As well, the candidate must be able to demonstrate strong understanding of office computer systems and the ability to acquire knowledge of City organizational structure, programs, and services and be familiar with and understand the issues that affect Calgary's municipal government.

PLACEMENT OF INCUMBENT IN ROLE

It is understood that Councillor will have diverse philosophies on Ward administration and Councillor resource management. As well, over time Councillor's resource needs may evolve or availability of qualified candidates may vary. The following descriptions differentiate Councillor's Community and Communications Liaison roles that require progressively greater knowledge, experience, skills, responsibility and complexity.

The intent of the Career Ladder below is to provide guidance to Councillor when placing employees into the role of Councillor's Community and Communications Liaison. The following level-of-work definitions allow Councillor to: a) hire incumbents for a fixed set of responsibilities not anticipated to change over time; or, b) hire a junior employee with the base qualifications of a university degree and progress these individuals as their skills, knowledge and contribution grows; or, c) hire experienced employees that have education, knowledge and skills developed after many years of related work.

First, Councillor should review both possible job descriptions Councillor's Executive Assistant or Councillor's Community and Communications Liaison and select the core function which best meets the needs of the role being filled. Second, given the qualifications of the employee and expectations of the role select the most appropriate level of work on the Career Ladder. Third, determine an appropriate salary within the relevant pay range that best represents the employees level of development, contribution and performance within the level of work selected.

COMMUNICATIONS AND COMMUNITY LIAISON CAREER LADDER

LEVEL 3

Incumbents at this level represents a senior Councillor's Community and Communications Liaison professional. The primary focus of this role is to provide broad and/or deep professional expertise and is considered a key resource to Councillor. The role works independently on complex issues, may make significant



judgement based on depth and breadth of knowledge. Demonstrates broad business, political and technical knowledge in resolving problems, project management, identifying opportunities and has a keen awareness of interrelationships with other stakeholders. This role has no formal supervision but is expected to provide assistance or guidance to other team members as required. Makes significant recommendations related to complex Ward or issue management. Qualifications - related university degree and a minimum of five years of related experience or equivalent, often incumbents have significantly more years of experience than the minimum.

LEVEL 2

Incumbents at this level represents a fully qualified Councillor's Community and Communications Liaison professional. The primary intent of this role is to independently assume responsibility for varied assignments requiring a broad understanding of the Ward, Councillor/Council protocol and City Administration and services. Focus is on achieving general objectives, incumbents are expected to work independently and manage their time, approach to problems, and work priorities. Problems solved by applying standard procedures, modifications of standard procedures, or using methods developed in previous assignments. This role has no formal supervision but is expected to provide assistance or guidance to other team members as required. Recommendations reviewed for soundness of judgement, but usually accepted as technically accurate and feasible, impact of work is limited by Councillor or team review. Qualifications - related university degree and two or more years of related experience or equivalent. Depending on the needs of the Ward, incumbent may remain at this level or progress to higher levels as greater responsibility and complexity is assumed.

LEVEL 1

This is the entry level of the Councillor's Community and Communications Liaison career ladder. The primary focus of this role is to take on basic assignment that support the Councillor team. At this level, incumbents are typically assigned tasks related to data capture, data analysis or investigating specific issues. The role is guided by theory, standardized practices, existing processes, general work assignment, and incumbent has timely access to guidance. Assignments are typically straight forward and after the task has been explained may require some guidance to ensure incumbent remains on-track. The impact of the role is limited, communication or actions that has potential for significant impact are reviewed by Councillor or by a senior team member. Qualifications - related university degree and minimal direct experience or minimum of four or more years of direct experience. Depending on the needs of the Ward, incumbent may remain at this level or progress to higher levels as greater responsibility and complexity is assumed.