

Navigating Through Uncertainty

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Director Corporate Services and Treasurer
Town of Pelham in the Niagara Region

My Background

- ▶ KPMG (9 years): Co-op Student and Staff Accountant
- ▶ Canadian Medical Products Inc. - now Henry Schein Canada (3 years): Controller
- ▶ Niagara College (21 years)
 - ▶ Budget & Special Projects Officer (1 year)
 - ▶ Manager Budget & Accounting (7 years)
 - ▶ Director Financial Services (6 years)
 - ▶ Vice President Corporate Services (6 years)
 - ▶ Vice President Strategic Planning & Finance (6 months secondment)
 - ▶ Vice President Business Development (1 years)
- ▶ Retirement 2015
- ▶ Teresa Quinlin & Associates Inc. (2 years): Consultant
- ▶ Town of Pelham (2.5 years)
 - ▶ Director Corporate Services & Treasurer
 - ▶ Interim CAO



Board Volunteer

Current Boards:

- ▶ Niagara Health Foundation Board (Treasurer)
- ▶ Women's Place of South Niagara (Treasurer & Advocacy Chair)

- ▶ Formally with:
 - ▶ YMCA Niagara (Audit Committee Chair)
 - ▶ Leadership Niagara
 - ▶ Investment Committee for Niagara Community Foundation

Situations that Cause Uncertainty

- ▶ Financial Decisions
- ▶ Political Interference
- ▶ Program & Service Reviews
- ▶ Job redundancies
- ▶ Government decisions (e.g. Governance Review by the Province)
- ▶ Elections
- ▶ Negative Media Coverage, Letters to the Editor & Social Media

Agenda: Two Examples of Navigating Through Uncertainty

- ▶ (1) Integrated Planning Process for Niagara College's Programs and Services: TransformNC
- ▶ (2) Political turmoil, loss of public confidence at the Town of Pelham

(1)

Transform

INTEGRATED PLANNING PROCESS
FOR NC PROGRAMS AND SERVICES

▶ Situation:

- ▶ VP Corporate Services at NC seconded to develop a system for evaluating programs and services, identifying areas of strength for investment and enhancement, and highlight areas and processes in need of improvement.

▶ Uncertainty:

- ▶ New framework to be developed- where to start? VP uncertain!
- ▶ Timelines unrealistic
- ▶ Staff and unions are anxious and questioning motive
- ▶ Controversy of this review process in other institutions (University of Saskatchewan, Brock University)
- ▶ First time VP seconded for a project at NC: high expectations

(1)

Transform

INTEGRATED PLANNING PROCESS
FOR NC PROGRAMS AND SERVICES

▶ Approach:

- ▶ Establish 23 member committee to develop the framework (faculty, support staff, students and administrators). *Need to build trust and buy-in!*
- ▶ Develop guiding principles for the committee and the project. *Stay focus!*
- ▶ Provide open and transparent process: *Communication is key!*
- ▶ Several Town Halls were held on all campuses in order to provide opportunities for people to ask direct questions in a public forum. Also provided video recordings on line. *Be honest and consistent in the message! Provide people an opportunity to express their concerns and for you to address them in an open forum.*
- ▶ *You need to gain trust! Once the trust is established, the organization will embrace the project and support it! Very successful outcome!*

(1)



▶ Key Takeaways:

▶ **Build Trust by:**

- ▶ Clear, open, consistent messaging
- ▶ Have multiple venues of communication
- ▶ Engage stakeholders to be part of the project
- ▶ Provide regular updates on the progress of the project
- ▶ Celebrate the completion of the project and show how the mandate remained the same

(2) Political Turmoil, Loss of Public Trust

▶ Situation:

- ▶ May 2017, started as the Treasurer on contract
- ▶ Public asking questions on past financial decisions and debt load
- ▶ Political issues between Upper Tier politicians and Local politicians
- ▶ KPMG conducts Forensic Review
- ▶ Community Centre is being built but land sales are delayed which are required to fund part of the construction costs
- ▶ Local newspaper criticizing Town staff and politicians
- ▶ Election in 2018 results in 100% new Council

(2) Political Turmoil, Loss of Public Trust (cont'd)

▶ Uncertainty:

- ▶ Treasurer new to Municipal Sector and to issues facing the Town
- ▶ Treasurer needs to get up to speed on the financial situation
- ▶ Internal borrowing of funds have left the Town with non-cash reserves
- ▶ Sale of land proceeds delayed and bridge financing will be required to complete community centre
- ▶ 100% new Council will require additional orientation, training and brought up to date on historical decisions impacting their term
- ▶ CAO leaves in January 2019
- ▶ Governance Review by Provincial Government on potential amalgamation

(2) Political Turmoil, Loss of Public Trust (cont'd)

▶ Approach:

- ▶ Open & transparent communication on the financial situation:
Town Hall meeting
- ▶ Be honest and provide a path forward
- ▶ Build relationships: Infrastructure Ontario, The local newspaper,
Ministry staff, other municipalities
- ▶ Provide Council with monthly updates on financial results
- ▶ Establish an Audit Committee

(2) Political Turmoil, Loss of Public Trust (cont'd)

▶ Key Takeaways:

- ▶ Keep stakeholders (residents, staff, Council, financial lenders) informed on the financial position
- ▶ Explain numbers in the easiest way for people to understand (graphs)
- ▶ Be confident, act with confidence, everyone is watching how you are reacting.
- ▶ Establish policies to ensure future financial strength is maintained.
- ▶ Integrity, openness and transparency are the pillars for gaining Public Trust.

Leadership Lessons Learned

- Don't reinvent the wheel
- Perception is reality
- Networks build relationships: be strategic
- Anticipate the needs of the student/resident
- Community matters: be visible and show you care
- Embrace the power of governance
- Foster high performance teams
- Establish an environment of creativity, innovation and fun
- Have a vision ... be action oriented
- Always lead with your values

Questions?

