

# **Town of Diamond Valley**

# **Post-Amalgamation Report:**

*An Operational Perspective*

August 2024



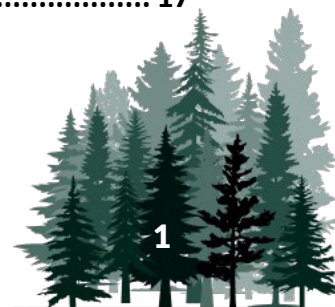
# Town of Diamond Valley Post-Amalgamation Report: *An Operational Perspective*

*Report by Adam Davey, Chief Administrative Officer (CAO)*

**August 2024**

## Table of Contents

1.	Introduction.....	2
1.1	Format .....	2
1.2	Report Limitations .....	3
1.3	Background .....	4
2.	SWOT Analysis .....	5
2.1	Strengths.....	5
2.2	Weaknesses.....	6
2.3	Opportunities .....	9
2.4	Threats .....	11
3.	How to Amalgamate: Phases, Lessons Learned, & Quick Wins.....	13
3.1	How to: Amalgamation Process (High-Level) .....	14
	Phase 1: Pre-Amalgamation .....	14
	Phase 2: “A-Day” – Active Amalgamation.....	15
	Phase 3: Post-Amalgamation .....	15
3.2	Lessons learned – Key Recommendations .....	16
3.3	Quick Wins .....	16
4.	Conclusions.....	17



## 1. Introduction

The intent of this brief report is to provide an operational overview of the ongoing post-amalgamation process for the Town of Diamond Valley. This report is a result of a Council Resolution to report on the status of the amalgamation project. Amalgamation between the two previous towns, Black Diamond and Turner Valley, became effective on January 1, 2023. As of writing, the post-amalgamation process has been ongoing for approximately eighteen months. Assuming current staffing and resources remains consistent, the post-amalgamation process ought to be concluded in another three or so years.

By 2027, or thereabouts, the new Town of Diamond Valley ought to have all governance, operational, and administrative systems in place to an extent reasonably expected of a similar sized town undergoing significant growth. By this time, the socio-political atmospherics of the community ought to be consistent with viewing ‘Diamond Valley’ as one community, and not two separate ones.<sup>1</sup> Put plainly, the amalgamation project should be complete – from both a community and organizational cultural perspective.

### 1.1 Format

This report provides a basic SWOT analysis from an operational point of view. A ‘SWOT analysis’ is a simple tool that considers the organization’s *strengths* and *weaknesses*, followed by organizational and environmental *opportunities* and *threats*. For the purposes of this report, the SWOT analysis is non-empirical and non-comprehensive. It is a snapshot based upon the informed opinions and observations of the current Management Team (Department Heads and CAO). Prior to the SWOT analysis, a quick overview on the limitations and background is provided. Following the bulk of the report, the SWOT analysis, a section on ‘lessons learned’ and recommendations will be considered for communities contemplating future amalgamation options. A section on ‘quick wins’ and closing remarks conclude the report.

---

<sup>1</sup> It is important to note that not all residents will adapt as quickly as others. The historical connections and ‘feel’ are deep and may not change as quickly. As in all things, there will be early adopters who quickly started to associate themselves with the new unified town and those who will hold on to the past.



## **1.2 Report Limitations**

There are many limitations to this report, which ought to be briefly mentioned to provide context. This report is written by the current CAO, who as of writing, has served about six months in the role. The information contained within is based upon the observations, learnings and informed opinions of the six department heads and new CAO. Of note, half the department heads have less than a year of service. In other words, half the current management team were not involved with the early stages of the amalgamation process, nor are they intimately familiar with the town's history; we are 'outsiders' who all became employed by the Town following the formal amalgamation. The upside of being an 'outsider' is it provides a level of bureaucratic neutrality free of emotional passions and opinions – good or bad. As such, this report does not consider the details and decision-making journey that led to amalgamation, and the immediate steps following amalgamation. On the other hand, half the management team were present during the amalgamation process serving as the vital operational leadership linchpin in guiding the organization and maintaining stability.

Further, this report considers only the *administrative* perspective – we lack the subject matter expertise to provide comment from a political, or community-centric standpoint. However, where possible, we do attempt to include considerations from multiple vantage points. Although the report attempts to maintain a level of academic detachment, it must be noted that only a neutral third-party could provide a level of impartiality beyond what this report attempts. Simply put, management has developed biases associated with frictions experienced in daily operations associated with the post-amalgamation process.

Finally, this report is written in plain language free of jargon, technical data, and other industry-specific writing to promote accessibility and future applicability for other communities considering an amalgamation. In this regard, it is the Town's hope that this brief report will be of future use for other communities – to learn from the experiences of Diamond Valley. Amalgamation is a rare and unique occurrence in local government; there is no 'textbook' to follow.



The decision to amalgamate was a significant one, perhaps the single-most impactful decision undertaken by both councils since the two previous towns' incorporations in the early 20<sup>th</sup> century. It required sustained political will, compromise and decision-making bandwidth undertaken over a few years to accomplish. Although any decision of sufficient magnitude attracts detractors and those opposed to change, the steadfastness of both previous towns' councils to take the long-view and gaze decades into the future ought to be commended.

Humans in general do not like change as we fear uncertainty. It requires discipline and leadership to make decisions that provide long-term benefit, at the price of short-term costs. It is a testament to council for making the strategic decision to amalgamate. Although perhaps not always popular nor easy during the ongoing aftermath of amalgamation, when taking the long view, amalgamation was the right decision for long-term community sustainment and flourishing. It is with this view – short-term costs for long-term benefit - that this report is written. In an era of instant gratification and uninformed, outraged opinions on social media changing more often than the weather, I commend the leadership for having the will and determination to take the long view and make the right decision, which will be measured over the coming years and decades.

### **1.3 Background**

The Town of Diamond Valley is Alberta's newest municipality, formed as an amalgamation between the previous towns of Black Diamond and Turner Valley. Both communities had fewer than 3,000 residents with town boundaries nearly adjoining one another, separated by a shallow river valley. With a combined population of less than 6,000 residents, amalgamation was the logical progression from a geographical, political, developmental, and operational perspective. Given Diamond Valley's proximity to the fastest growing major city in Canada, Calgary, significant population growth is expected over the next decade. At build out, Diamond Valley's water and sewerage infrastructure is expected to have the capacity to manage up to 10,000 residents. Given the significant growth that is continuing in the communities surrounding Calgary, and in particular Diamond Valley's nearest neighbor of



substantial population, Okotoks, the amalgamation process is providing Diamond Valley with the best option to proactively manage coming change.

The post-amalgamation process continues to occur during a period of societal change: recovering from the global supply-chain issues emerging after the Covid pandemic, four-decade high inflation, significant demographic disruption (peak retirement with high immigration and four generations sharing the workspace), escalating costs of living, and challenges with affordable housing and services. These matters are not considered within this report.

However, it is important to note that many challenges the Town faces are not caused by amalgamation, but rather correlated to these larger difficulties that all households, organizations and governments are currently grappling with. Simply put, amalgamation should not be the scapegoat for larger societal and structural problems. This point cannot be emphasized enough: many of the frictions the amalgamation process continues to deal with are a result of these larger challenges. Or put differently, had amalgamation occurred ten years ago, the problem environment may have appeared simpler.

## **2. SWOT Analysis**

Although SWOT analyses have limitations, as a basic evaluative tool examining organizations and the complex environments they operate in, it is fairly effective at providing an accurate point-in-time snapshot. The following *strengths, weaknesses, opportunities* and *threats* the Town of Diamond Valley is faced with is a consolidation based upon the Management Team and CAO's informed opinions.

### **2.1 Strengths**

The main strengths are gains in operational efficiency through a reduction of duplication and competing efforts. Many of these strengths are just getting underway and have not been realized, yet. As the post-amalgamation project continues, gains are expected to be realized over the next two to three years. Nonetheless, many strengths are already apparent. The following points illustrate some main highlights:



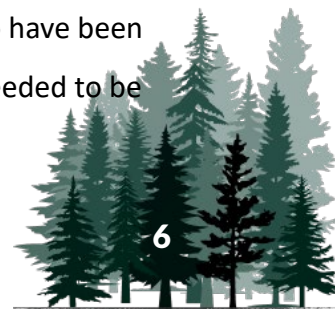
- ✓ Two councils comprised of 14 elected officials consolidated into one unified council of seven members
- ✓ Two management teams consolidated into one management team; one CAO
- ✓ Consolidation of Public Works infrastructure, capital planning, projects, etc.
- ✓ Unified grant application opportunities (versus competing grant applications)
- ✓ Consolidated and unified fire department, civic events, and Town operations
- ✓ Professionalization transition – corporate functions, financial systems, planning documents, process and plans, staffing opportunities (currently in the initial stages)
- ✓ Organizational orientation towards future growth and development – moving towards proactive posture (for upcoming town growth and development)

As the post-amalgamation process remains in the early stages, many expected strengths are listed under opportunities. Should this report be updated in another three years, it is expected that the strengths column will have grown significantly, and the weaknesses column accordingly reduced. As previously stated, the amalgamation process is positioned towards *long-term* gains (strengths).

## **2.2 Weaknesses**

This is the most important section within this report from an operational perspective, and for other communities considering their own potential amalgamation. Pointedly, an amalgamation is a *merger* – complete with all the complexities two merging cultures and ‘houses’ create. As both previous towns were approximately the same size (and budget, staffing, and so forth), amalgamation produced a new corporate, organizational, and cultural entity that inherited both previous Towns’ assets and liabilities. Although the decision to amalgamate was significant, the planning process of the ‘how to’ was of equal importance. Unfortunately, the planning aspect appears to have been largely missing.

For successful mergers, planning is essential. A merger – known as an ‘amalgamation’ in local governance parlance – is a major project. As such, a *Project Charter* ought to have been required with a sequenced, and appropriately resourced program of plans that needed to be





cadenced in a manner so that all the individual plans are supportive and consolidated into an integrated approach. The overarching ‘Amalgamation Plan’ ought to have been program managed by a neutral third party specifically tasked with carrying out the merger, reporting separate from daily operations.

Thus, two streams would emerge: the amalgamation team, and the daily operations team. Funding and constrained resources imposed limitations on this; however, the Government of Alberta provided amalgamation funding that could have been used for this purpose. The amalgamation team would produce an overall amalgamation strategy, and a continual planning process would occur to transition two organizations (workplace culture, process, procedure, policy, budgeting, etc.) into one single, unified organization. Although this is not a comprehensive list, the most crucial sub-plans required include:

- 3Ps: Policies, Procedures, Processes: for corporate wide (such as IT, HR, Financial Reporting, Records Management, Bylaws), departments (Finance, Public Works, Community Services, Public Safety, Legislative Services, Planning & Development), and assets (infrastructure).
- Transition Plan: physical workplace moves, IT/HR systems, office space, records management, assets, change management (psychological landscape – shifting toward creating a new organizational culture).
- Financials: budget, reporting, systems.
- Planning & Development: list of plans, process, bylaws, etc.
- Continuity of information and services.
- HR plan: the turnover of staffing experienced in Diamond Valley approached 50%. Since amalgamation on January 1, 2023, the author appears to be the fourth individual to serve in the CAO position (including ‘Acting’). The turnover of staff, particularly in management positions, combined with a lack of a plan were the two largest factors in a rocky transition period. Because of this, the post-amalgamation process is still in the early stages and requires significant additional effort and resources.





The following select list of weaknesses ought to form the basis of ‘lessons learned’ for future applicability for other communities considering an amalgamation.

***Select list of weaknesses:***

- No formalized plan or planning process apparent at any level of the organization. Overall strategy with clearly defined objectives, responsibilities and communications was not present.<sup>2</sup>
- Staff turnover – terminations and resignations – resulted in a marginal operating capacity. It will likely be another three or so years until a new organizational tempo, performance and culture is operational at a satisfactory or higher level.
- Multiple missing links – loss of organizational knowledge. No staff handover planning; hence most information prior to amalgamation requires significant effort to locate, assess, etc. Overall, lack of situational awareness – high learning curve, loss of historical knowledge.
- Staff burnout. Amalgamation is not for the faint of heart. It produces a similar long-term tempo as a chronic emergency event: increased sick time, absences, lower staff morale and productivity ensues. Significant overtime incurred; a reduction of the OT bank requires additional budget for onetime payouts, or a reduction of output due to accommodating staff time off. Shifting this ‘mood’ or overall morale situation should not be overlooked; it may be the most essential element. Time will tell if the current CAO (and wider management team and staff) possesses the capabilities to rectify this. This aspect illustrates the necessity of a separate amalgamation project team from daily operations.
- Partner organizations and service providers. Ensure neighboring local governments, partner agencies, non-profits, community groups and service providers are well-informed and integrated within the plan.

---

<sup>2</sup> A ‘Joint-Friendship Committee’ was struck to commence initial planning discussions.



- Time. The change management process takes longer than what is likely expected. Accordingly, expectations of staff, the community and council need constant and careful downward expectation management to ensure aspirations are aligned with strained capabilities.

The weaknesses section has the most inherent bias as the management team providing input is actively engaged in the ongoing amalgamation project. Organizational and individual fatigue is a main consideration at this point, less than two years post-amalgamation. For planning purposes, the amalgamation project likely spans 5-10 years from conception to completion. Lots of change should be expected in a timespan approaching a decade: two provincial elections, three council terms, perhaps considerable leadership changes, shifting budgetary realities, and a changing community.

On the other hand, many of the points in this section can be substantially mitigated, reduced or eliminated with a disciplined and methodical planning process, role delineation, objective definition, and adequate resources sequenced over a timeline that has enough flexibility to shift with changing faces. Likewise, many weaknesses are inherent and cannot be overcome, such as the human element challenged to adapt and thrive under changing conditions.

Should this report be updated in three years' time, it is reasonably expected the weaknesses will be significantly reduced, and strengths commensurately increased. This section is not meant to criticize past decisions, rather it is intended to serve as applicable 'lessons learned' for future use. Many of the complexities of the amalgamation process were only uncovered in hindsight, and no amount of planning would have accounted for all bumps in the road. The best time to have built an amalgamation plan would have been pre-amalgamation; and the second-best time is now.

### **2.3 Opportunities**

This is the most important section to capitalize on and ought to receive the most attention for the Town of Diamond Valley's current and future decision makers. As most of



humanity now lives in urban areas and continues to move to built up areas, the demographic future appears bright for Diamond Valley. Amalgamation provides the opportunity to consolidate services and assets and conduct long-term planning for the new combined tax base to sustain an adequate level of services. Possessing strong geographic fundamentals, such as ample land for development, significant capacity in the new sewage lagoon system, and water license for perhaps 10,000 residents, Diamond Valley is well positioned for community sustainment and long-term revitalization.

From an organizational perspective, there are numerous opportunities available to capitalize upon. As change is the only constant, it is better to proactively “lead change” than conduct “change management.” These opportunities include:

- Consolidation and divestment of aging infrastructure toward fewer assets that can be sustained into the long-term.
- Conduct a comprehensive asset management plan to fund long-term renewal.
- Multi-purpose staff training to develop “generalists” to fill a variety of front-facing roles. This may allow for depth to be built in critical positions. Restructuring activities ought to include succession management planning and aligning skillsets to service requirements.
- Modernize all administrative systems using technology: 311, AI, new financial software, and other tools to reduce staff time and enable customers to better manage their own services (i.e., automated permits and utility bills).
- Start “anew”: Although a municipality is a going concern that evolves over many decades, as a newly amalgamated municipal corporation, the Town is in a unique position to make rapid changes – both operationally and culturally – that better fit the larger societal pace of change.
- Disciplined decision making that favors realistic outcomes. Strategic planning needs to remain tethered to existing capabilities. Although a positive disposition is necessary, so too is a clear-eyed realism of ensuring the budget is aligned with objectives.

Opportunities are *future tense*: that is, they are *potentials*, and must be carefully managed to capitalize on and produce results. Similarly, threats can be reversed to create



potential opportunities if thoughtfully addressed. Likewise, opportunities that are not managed well can turn into threats. At this juncture, the Town is at a crossroads, and depending how well the council-management interface is managed, these opportunities can be maximized, or they can turn into significant points of future challenge.

## **2.4 Threats**

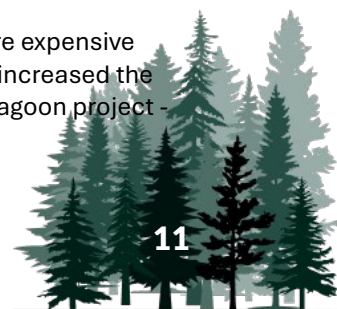
There are numerous threats in the external environment that are not unique to Diamond Valley. Although beyond the scope of this report, the most pressing matters to most employers are, the cost-of-living crisis exacerbating a potential wage-cost spiral, a multi-generational workforce with divergent and oftentimes opposing norms and values (dress and deportment, work-life balance philosophies, etc.), competition for scarce talent, inflationary cost drivers for nearly everything, and affordable housing options.

Regarding threats specific to the local government industry, there has been significant cost escalation for capital projects, maintenance, utilities, and almost every service and assets a local government uses, operates, and owns. Unfortunately, operating and sustaining current services requires significant increases in budget, a reduction of services, or a level of efficiency gains that elude the industry, and more specifically, the Town. The reason for this is that societal expectations of exponential gains experienced in the IT sector (i.e., smartphones) does not necessarily transfer to local government, where many of our services and levels of service are not supported by a business case and even incremental gains in efficiency face resistance and pushback (i.e., digitizing bills). Most importantly, at some point in the future, a new funding model between the senior levels of government and municipalities is required to fund long-term infrastructure renewal.<sup>3</sup>

As this relates directly to Diamond Valley, our lack of non-residential taxbase will prevent the Town from significant revitalization of our existing assets until a new funding source

---

<sup>3</sup> Further, requirements imposed on the Town by higher levels of government often create more expensive projects than those of the past. For example, increased protections to the environment have increased the wastewater handling requirements that the Town must abide by, adding costs to the current lagoon project - it's not as simple as adding another pond anymore.



(transfer payments from senior government, massive economic development) is identified. Simply put, the existing tax base cannot sustain infrastructure replacement without substantial and sustained increases to residential mill rates. For example, escalating facility replacement costs suggest that, at present, there is no fiscally sustainable path forward to replace aging facilities such as the swimming pool or arena. These challenges are a common experience with many other local governments across Canada, hence a new funding model is needed.

At the organizational level, there are numerous threats that could potentially be reversed into opportunities. These include:

- Current organizational practice demonstrates a very high staff turnover rate for senior staff (positively, this has stopped in 2024, so far). It is nearly impossible to gain consistency and stability in this environment. Building and sustaining an efficient and effective team ought to remain the top priority – all other success flows from here.
- Over-promising and under-delivering. It is imperative that political aspirations remain tethered to administrative capabilities. When goals become aspirational and capabilities are spread thin, a gap between the commitments and working capacity emerges and it becomes difficult to close.
- Staff morale and burnout: amalgamation was a significant undertaking. Many local government professionals will not experience an event of this complexity, scope, and duration in their careers. From concept to completion the amalgamation project may span a decade. Sustaining a motivated workforce becomes a cardinal challenge.
- Lost institutional knowledge – ‘known unknowns’. The new Town carries with it decades of both towns’ previous experiences, assets and decisions.
- Escalating repair costs for critical infrastructure is expected to continue for the foreseeable future.
- Budget and decision-making uncertainty. Four-decade high inflation has made policy making difficult, posing trade-off costs.
- Adapting modern software and processes takes time (training), funding, and staff “buy-in.” At present, none of the three inputs are present in high volume.

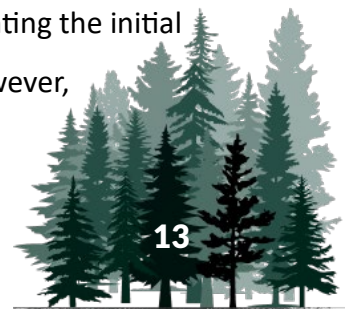


- Short-term reaction (perceived gain), long-term costs. As with many local governments, the ubiquity of social media can place fringe issues front and center, and this poses challenges to long-term planning and current management attention.
- Development of a new organizational culture and identity. Once the staffing situation has normalized, the new team can stabilize and eventually thrive. Creating a new organizational culture that brings the “good” while leaving the “poor” practices of both previous towns takes time. It requires careful management to ensure a new culture of stable performance can emerge.
- Succession planning, talent management and employee attraction. Local government is currently experiencing a ‘seller’s market,’ where top talents flow to organizations with solid reputations, compensation structures and organizational culture. Developing this takes time, money and sustained alignment and commitment between council and management.
- Long-term strategic coherence. Many local governments struggle with aligned long-term strategic direction, this is inherent within the electoral process. With escalating operating costs – and the taxation impacts – long-term policy direction is difficult to achieve.

The threat environment can be broadly classified as those external items that are not controllable (economy, escalating costs of goods and services, natural disasters, such as flooding) and those things can be somewhat managed internally – staff turnover, implementing efficient and technology-enabled processes, not over-promising, and so forth. Budget 2025 shall be an interesting bellwether for how the next phase of the amalgamation process unfolds.

### **3. How to Amalgamate: Phases, Lessons Learned, & Quick Wins**

The following outlines the basics required of amalgamation, from both a “best-case” scenario, and what occurred in practice with Diamond Valley’s experience. In the best-case scenario, the amalgamation project can take place in five or so years, from appointing the initial steering committee to achieving normal daily operations post-amalgamation. However,



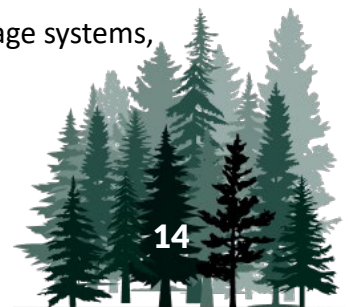
amalgamation discussions likely would have occurred between the two towns for a few years prior to this – to consider the idea (as was the case between the two previous towns here, Turner Valley and Black Diamond). Additionally, unexpected disruptions, in terms of staff turnover and budget challenges will likely persist, post-amalgamation. The “one step forward, two steps back” sort of thing. In other words, plan for 5-10 years from concept to completion.

### **3.1 How to: Amalgamation Process (High-Level)**

#### **Phase 1: Pre-Amalgamation**

Planning & preparation leading up to ‘A(malgamation)-Day.’ This phase is likely three years or so of active work. This does not include a ‘pre-phase 0,’ which is the discussion from ‘amalgamation concept’ to active pre-amalgamation work. The pre-phase may span several years, depending on political will and community buy-in.

- *2-3 years prior to A-Day:* Create an amalgamation steering committee (both councils) and appoint an amalgamation team (comprised of both town staff)
  - Inventory all assets, financials, hardware, staffing, etc.
  - Develop an amalgamation strategic roadmap (outsource to a third party) – key deliverables from now, to amalgamation, to post-amalgamation ‘routine operations.’
- *A-Day minus one year:* Appoint an ‘Amalgamation Manager’ (external, not an existing CAO), separate Town daily operations and the amalgamation team – allocate budget to do so (this is a project – think of it as such).
- Tactical plans – how the two Towns and all associated systems will merge:
  - Physical move and assets – vehicles, computers, office space, etc.
  - Financials – all systems – reporting, budgeting, auditing, AP/AR, 3Ps, etc.
  - Legislative Services – Bylaws, 3Ps.
  - Planning & Development – Bylaws, Plans, 3Ps, historical records, etc.
  - Public Works – engineering, capital plans, assets, water and sewerage systems, roads, snow removal, 3Ps, etc.





- HR and change management. 3Ps – ‘change management’ plan, succession management, etc. Establish joint management team<sup>4</sup>
- Council – merger. election, new Chamber rhythm, etc.
- Communications Plan – critical piece. Expectations management in particular – amalgamation is a lengthy and costly (resource-intensive) process.

## **Phase 2: “A-Day” – Active Amalgamation**

This phase likely lasts several months, and the shift from Phase 1 to 2 occurs when amalgamation is both a legislated and operational reality. The legislative date of the new legal entity, the “Town,” represents the small tip of a very large iceberg. Date of amalgamation commences Phase 2, and concurrent to this, operations and administration continues to shift. This phase ends with the successful completion of a full annual Town cycle: approving a budget and then reporting – audit process.

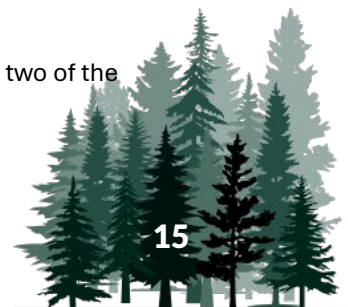
- All systems and people in place to a 60% level.
- “Amalgamation Day” represents the “go live” point, but the process will likely span several months – physical office moves, new consolidated council, etc.
- Minimum one-year cycle.

## **Phase 3: Post-Amalgamation**

This is where the Town of Diamond Valley currently sits as of writing. This phase can last anywhere from one to three or more years following Phase 2. Although “Amalgamation Day” may appear to conclude the process from a public perception point of view, the real operational and administrative heavy lifting remains. With prior planning, Phase 3 may have been easier to implement and achieve than has been Diamond Valley’s experience. However, with a lack of amalgamation planning framework, much of what ought to have occurred during Phase 1 is now being completed in Phase 3. The planning consideration for other communities is to complete

---

<sup>4</sup> A major learning is that similar job title or responsibilities have been quite different between two of the “same” positions from the previous Towns which has caused some problems.



Phase 1 in a thorough manner. This would see Phase 3 last perhaps one or two years. For Diamond Valley, Phase 3 may last another three years, to 2027, or thereabouts.

- All new systems, 3P and people established to a 90% level.
- Culturally, there is now only “one town.” Staff and elected officials refer to the present tense, not past tense. Much of the work during this phase focuses on alignment, consolidation and organizational culture.

### **3.2 Lessons learned – Key Recommendations**

- ✓ Planning process: Build an Amalgamation Plan. Ensure it is resourced and sequenced with clear objectives and assigned responsibilities (budget, staff, time, council/administration/community “buy-in”).
  - ✓ Manage expectations: It will take longer, and cost more than initially expected. Burnout, turnover and criticism is the norm.
  - ✓ Timescale: Five (5) to ten (10) years from concept to conclusion.<sup>5</sup>
  - ✓ Communicate, communicate, communicate: With the community, staff, council, and partner organizations.
  - ✓ Culture/change management: Regardless of level of planning effort, expect a roller coaster of an experience – from staff, elected officials and the community.
- Amalgamation is a major project, and it may be the most impactful event in a local government staff/elected officials’ career. Learn to be uncomfortable with an unknown future.

### **3.3 Quick Wins**

For a variety of reasons, bad news tends to get more attention – in the media/social media, council chambers, and at staff desks. This section champions a number of ‘quick wins’ and sustained success that have already occurred. Highlights include:

---

<sup>5</sup> Five years with a perfectly executed plan, and closer to ten years for everyone else.



- ✓ Ongoing consolidation of effort and assets: infrastructure, such as the new lagoon project, arena ice plant replacement, and upcoming sale of the former TV municipal site.
- ✓ Increased efficiency: fewer ‘cooks in the kitchen.’ From 14 elected officials and two CAOs into seven (7) members of council and one CAO (and one CFO, etc.)
- ✓ Increased peer support among staff. Where staff have been brought in from both previous Towns, they have been able to share ideas on what has worked or not and move forward with greater breadth and depth in problem-solving and the decision-making process
- ✓ Increased professional attraction. Amalgamation is a (fairly) rare and unique opportunity that most local government professionals will not experience. The amalgamation process produces a challenging and attractive environment for professionals seeking to make a difference and push their professional skillsets to the fullest
- ✓ Accelerated modernization process. Promotion of 21<sup>st</sup> century technology – eGov services, upcoming automation, etc.
- ✓ More competitive for future grants, greater regional “voice”: the Town of Diamond Valley combines two previous towns, thus exerting more influence.

## 4. Conclusions

This report is written from the perspective of senior administration in August 2024, some eighteen months following the official amalgamation date of January 2023. It is primarily viewed through an operational lens and serves the intent of providing practical applications for future Town use, and highlights lessons learned for other municipalities considering the amalgamation process. Although the report may appear critical of both decision making and operational gaps leading up to amalgamation and ongoing through the post amalgamation process, the intent is to use this as a learning opportunity to course adjust for future long-term sustainment and success for the Town of Diamond Valley.

Like any major undertaking, an amalgamation - a merger - is a complex and significant project with numerous expected, and unknown, shortfalls. In other words, amalgamation produces short-term organizational pain for long-term organizational and community gain. The



decision-making determination required to embark on the amalgamation journey stands as a testament to the visionary leadership of those elected officials and administrators involved in that complex process. Amalgamation was the right decision which will be made evident in the years and decades to come.

*A special thanks to management and council for the direction and participation in this brief report.*

*-Adam Davey, CAO, August 2024*

