

The logo for the City of Edmonton, featuring the word "Edmonton" in white text on a blue square background.

**OFFICE OF
THE CITY AUDITOR**

REPORT
**COUNCIL & COUNCIL
COMMITTEE REPORTS
AUDIT**

JANUARY 30, 2023

Project Summary

BACKGROUND

The City Manager and Administration use reports, memorandums, and emails to provide information, advice and recommendations to Council. Reports are the primary tool to provide information to City Council and Edmontonians. Council and Council committees ask for reports by passing a motion. Administration also initiates reports when a business area identifies the need to send information to Council or a Council committee.

From 2018 to 2022, Administration sent an average of 652 reports per calendar year to City Council and Council committees. This number does not include land use reports that are dealt with at City Council Statutory Public Hearing.

AUDIT OBJECTIVES & SCOPE

The audit objective was to determine if Administration provides City Council with reports that support informed decision-making.

We used a subject matter expert to review the report writing instructions and a sample of reports.

WHAT WE FOUND

The City Manager's Office provides instructions for City staff who prepare Council and Council committee reports. Their instructions include:

- When to use an email or memo.
- The process for preparing a report.
- A style guide for writing and editing reports.
- How to use council report templates.

However, they do not have instructions for when to use a Council report. We also found the instructions, guides, and templates do not provide enough guidance to report writers on how to write clear, readable reports.

Our review of a sample of 15 reports found the information in them to be objective and timely. However, sampled information within 7 of the reports contained information that we could not validate. As well, the subject matter expert indicated that most of the reports could have been clearer and more concise.

POTENTIAL RECOMMENDATION

Recommendation 1 We recommend that the City Manager strengthen Council and Council committee report writing instructions to clarify the process and set clear writing standards for reports.

Recommendation 2 We recommend that the City Manager improve readability and fully support information in reports to Council and Council committees.

WHY THIS IS IMPORTANT

Having clear instructions will help report writers provide Council with reports that are easier to understand.

Council and Council Committee Reporting Background

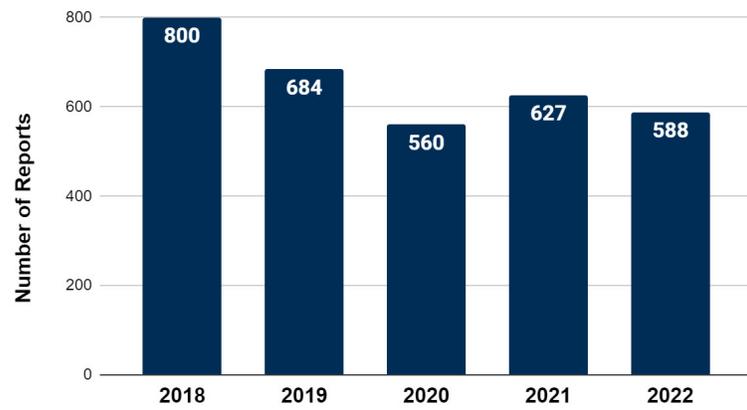
City Council is the main decision-making body for the City of Edmonton. Council's governance structure includes nine standing committees which receive specific mandates and authorities through the Council Committees and Audit Committee Bylaws.

While Council has final decision-making authority, the City Manager is the primary advisor and liaison with City Council. The City Manager and Administration use three formats to provide information and make recommendations to Council:

- **Council Reports:** Council and Council committees ask Administration to prepare reports by passing motions. Individual Councillors can also direct Administration to create a report in response to a Councillor inquiry. Administration can also decide to send a report to Council or a Council committee. All such reports become part of the agenda at Council and Council committee meetings.
- **Memorandums:** Council can ask for, and Administration can initiate, memorandums for information only. A memo addresses less complex or strategic matters and time sensitive information. The Office of the City Clerk reviews the memos that Administration sends to Council, and, subject to the *Freedom of Information and Protection of Privacy Act*, the memos are published on the Open Data Portal.
- **Emails:** Administration uses email to address constituency matters, narrow topics or routine matters.

From 2018 to 2022, Administration presented an average of 652 reports per calendar year to City Council and Council committees. This number does not include emails, memos, or land use reports dealt with at City Council Statutory Public Hearings.

Volume of Council and Committee Reports, 2018 to 2022



Staff within City branches write the reports. The Office of the City Manager provides instructions for them to follow. These instructions include:

- **Communication Method with Council:** instructions to City staff on when to use an email or memo to communicate to Council.
- **Report Process:** instructions for preparing and submitting reports.
- **Style Guide:** general style principles for reports. The guide sets standards for things like spelling, punctuation, and capitalization, and provides guidance on word usage.
- **Templates:** sample reports that have some details already in place, such as headings and format.

Templates also include report writing instructions. The City has templates for each of the different types of reports to Council. The three main templates are for reports for information or recommendation, reports relating to bylaws, and reports from organizations external to the City.

The department and branch that prepares the report is accountable for the information they provide. After department staff prepare a draft report, they circulate it to all related departments for review and comments. After the department reviews are complete and the authoring department has resolved any suggested changes, the Office of the City Clerk reviews the format and recommendations in the report. The Office of the City Manager provides final content approval before a report is added to the appropriate Council or Council committee meeting.

Recommendation 1: Strengthen Report Writing Instructions

RECOMMENDATION

We recommend that the City Manager strengthen Council and Council committee report writing instructions to clarify the process and set clear writing standards for reports.

KEY FINDINGS

The City Manager's Office provides instructions for City staff who prepare Council and Council committee reports. This includes instructions for when to use an email or a memo to communicate with Council. However, we found it does not have specific instructions for when to use a report.

We also found that the instructions do not provide enough guidance on:

- Writing clearly, concisely and in plain language. This includes reducing the use of jargon.
- The use of the executive summary and attachments to supplement and enhance reporting.

REPORT WRITING INSTRUCTIONS

We found opportunities to improve each of the report writing instruction documents that the City Manager's Office provides to report writers.

Instructions for Communication Method with Council

The City Manager's Office has instructions for when to use an email or a memo to communicate with Council. However, it does not have instructions for when to use a council report. Some guidance on specific reasons to use a report would be useful. Such as when there is a need for an external party to speak to the topic of the report.

The decision of which method to use to provide Council and Council committees with information requires judgment and depends on the complexity and nature of the topic. Another

way the Administration knows which method to use is when it is clear in the motions made by Council and Council committees. It is important for Administration to work with Councillors to craft motions that are clear on the expected method of communication.

Instructions for the Council Report Process

These instructions outline steps to completing a Council report. Some improvements to this guide include:

- Guidance for writing a short, clear, useful executive summary of the report itself.
- Guidance on the use of attachments. For example, remind writers that generally attachments supplement the information in the report (not include information necessary for the report). As well, the report should also refer to attachments at the place in the report where readers might find the attached information useful.
- Guidance on who should review what. For example, who is responsible to review and approve the accuracy of the information in the report?
- Guidance on keeping and/or referring to information and documents that support the information in the council reports.

Council Report Style Guide

This guide sets out general style principles for reports. It sets standards for topics such as spelling, punctuation, and capitalization, and provides guidance on word usage.

The document says that the City is committed to using plain language. However, it does not include standards or examples for plain language. It also does not provide examples or links to sample reports to illustrate how to write about complex technical topics in plain language.

Content experts may struggle to find ordinary words to describe details and explain concepts that Council needs to consider when making decisions. Without specific examples of how to translate technical topics into plain language, writers

will continue to use jargon and technical language that does not meet Council's need for clarity.

Council Report Templates

The templates do not follow some of the general principles set out in the style guide. This includes:

- Using active voice in the template instructions so that it is clear who is responsible for specific tasks.
- Using clear, everyday words instead of jargon and vague words, so that writers know what to do and what to avoid doing.
- Using consistent wording, word order, and format across all templates.

WHY THIS IS IMPORTANT

Inconsistent and unclear instructions could result in potential frustration and confusion for writers. We also believe clear instructions would have enhanced the quality of reports the Administration produces.

RECOMMENDATION 1 MANAGEMENT RESPONSE

Strengthen Council and Council committee report writing instructions to clarify the process and set clear writing standards for reports.



Responsible Party

City Manager



Accepted by Management

Management Response

The City Manager's Office accepts the findings from the Office of the City Auditor. In order to implement this recommendation, Administration will:

- Add considerations for when to prepare a Council report to our guidance on communicating with City Council.
- Update and revise the Council Reports Style Guide to include standards or examples for plain language and provide examples or links to sample reports to illustrate how to write about complex technical topics in plain language.
- Update the Council report templates to more clearly follow the general principles set out in the Style Guide.

**Implementation Date**

July 31, 2023

Recommendation 2: Improve Readability and Fully Support Information in Reports

RECOMMENDATION

We recommend that the City Manager improve readability and fully support information in reports to Council and Council committees.

KEY FINDINGS

We reviewed a sample of 15 Council and Council committee reports. We chose reports from each department based on the number of reports written in 2022¹.

We found the information in them to be objective and timely. However, there was some information in 7 of the 15 sample reports that we could not validate. As well, 10 of the 15 sample reports contained examples that did not use plain language, such as active voice, shorter sentences, clear headings, and useful bullet lists.

VALIDATION OF INFORMATION

We evaluated a sample of the data included in 15 Council and Council committee reports to decide if:

- The data agrees to the original and is from a credible source.
- Administration used relevant information in calculations used to produce the data.
- We could recalculate the data.

In 7 of the 15 reports, we could not validate the accuracy of some of the sampled data points. Examples include:

¹ Number of reports we reviewed by department: Financial and Corporate Services (six), Urban Planning and Environment (three), Office of the City Manager (two), Community Services (two), City Operations (one), and Integrated Infrastructure Services (one)

- Quoting the incorrect percent of urban canopy on private land in Vancouver: 95 percent quoted versus 37 percent actual.
- Not having support for the number of Edmontonians who provided feedback at in-person events or through on-line surveys that was included in a report.
- Including an estimated cost for a third-party feasibility study that was not supported by a quote or any other support.

READABILITY

Our subject matter expert reviewed the 15 sample reports for readability. This includes looking for clarity (use of plain language, such as active voice, shorter sentences, clear headings, everyday words, and useful bullet lists) and conciseness. Of the 15 reports, our subject matter expert found 10 where Administration could have made it easier for readers to understand the information they provided. The types of comments we received from the subject matter expert fall into the following categories:

- Word usage. Most of the findings are related to the use of jargon, passive voice, and unclear word usage.
- Sentences are too long.
- Report content. Most of the subject matter expert comments are about confusing, vague, and ambiguous content. Other findings include the order of information and missing sections that caused confusion about the information presented.
- Presentation of the information. This included the logical order of information and the effective use of presentation format.
- Executive summaries not aligned with the report itself.

WHY THIS IS IMPORTANT

Increased accuracy and readability of reports will provide Councillors and Edmontonians with more understandable information for making decisions.

**RECOMMENDATION 2
MANAGEMENT RESPONSE**

Improve readability and fully support information in reports to Council and Council committees.

**Responsible Party**

City Manager



Accepted by Management

Management Response

The City Manager's Office accepts the findings from the Office of the City Auditor. In order to implement this recommendation, Administration will:

- Increase the use of citations and footnotes within Council reports to demonstrate accurate and valid information sources.
- Improve readability and clarity of council reports through the increased use of plain language, shorter sentences, clear headings and useful bullet lists.

**Implementation Date**

February 28, 2024

ACKNOWLEDGEMENT

We would like to thank the staff in the City Manager's Office and the departments whose reports we reviewed for their cooperation during the audit.