



# Town of Whitby Policy

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<b>Policy Title:</b>	Standards for Town Policies and Procedures
<b>Policy Number:</b>	To be assigned
<b>Reference:</b>	Municipal Act, 2001, Council Resolution #52-13, #42-17, and #123-18, #106-23
<b>Date Approved:</b>	February 11, 2013
<b>Date Revised:</b>	June 24, 2024
<b>Approval:</b>	Council
<b>Point of Contact:</b>	Town Clerk

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## Policy Statement

The Corporation of the Town of Whitby is committed to developing and maintaining Town Policies, Procedures, and Standard Operating Procedures that contribute to the achievement of its goals and priorities and provide transparency, clarity, fairness, and consistency in decision making related to the administration and operations at the Town of Whitby.

## Purpose

The purpose of this policy is to provide a consistent approach to the development, management, and approval of all Town Policies, Procedures, and Standard Operating Procedures.

## Scope

This policy applies to all Town Policies, Procedures, and Standard Operating Procedures.

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## 1. Definitions

- 1.1.**CAO** means the Town's Chief Administration Officer.
- 1.2.**Department Head** means an officer or employee of the Town who will generally hold the title of 'Commissioner', appointed by the Chief Administrative Officer or Council, as required, to oversee a department, or a person appointed or designated to act in place of the Commissioner when the Commissioner is absent or refuses to act.
- 1.3.**Guidelines** means a document that lists a set of rules or instructions indicating to an individual or group of people how a task or responsibility is expected to be performed.
- 1.4.**Policy** means a document containing general statements of the Town's intentions or objectives in various matters under its control, for the purpose of providing consistent and fair practices for present and future decisions.
- 1.5.**Procedure** means a document providing general instruction to all Town employees on an administrative practice. A Town Procedure may also be linked to a Town Policy for the purpose of providing further clarification and specific details of administrative practices based on intentions or objectives set forth in a Town Policy. Town Procedures are approved by the Chief Administrative Officer and are applicable to the entire corporation.
- 1.6.**Standard Operating Procedure (SOP)** means a document containing detailed instructions pertaining to a certain department or business unit, approved by a Department Head, that states clearly and precisely what must be done, who is to do it, how it is to be done, and when it is to be done (job and task specific).
- 1.7.**Town** means The Corporation of the Town of Whitby.

## 2. Responsibilities

### 2.1.Council to:

- Approve Finance, Governance, and Municipal Service Levels policies and amendments to those policies.

### 2.2.Chief Administration Officer (CAO) to:

- Approve Accessibility, Corporate Administration, Facility Management & Operational Services, Human Resources, and Technology policies and amendments to those policies;
- Approve Procedures and amendments to Procedures;
- In conjunction with the appropriate Department Head, maintain the relevancy of Town Policies and Procedures; and,

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- Ensure adherence to all Town Policies and Procedures and remedy any deviations as they occur.

#### 2.3. Department Heads to:

- Advise the CAO and Council on implications of Policy;
- Approve Standard Operating Procedures and amendments for their respective department or business units; and,
- Ensure adherence to all Policies and Procedures; and,
- Maintain the relevancy of Policies and Procedures related to their areas of responsibility.

#### 2.4. Town Clerk to:

- Maintain a master listing of Policies and Procedures; and,
- Ensure that Policies, save and except for Human Resources and Technology categories, are posted on Whitby.ca for public access in an accessible format; and,
- Ensure that Policies approved by the CAO that are newly created or substantially revised are circulated to Council for their awareness on the Council Information Index following the CAO's approval.

#### 2.5. Town Staff to:

- Adhere to all Town Policies, Procedures, and Standard Operating Procedures.

### **3. Framework for Town Policies, Procedures and Standard Operating**

#### 3.1. Policy Categories and Approval Authority

Town Policies and Procedures will be assigned in the following classifications:

**Table 1: Policy Categories and Approval Authority**

Approval Authority	Section	Description
Council Approved	Finance	Policies that pertain to and establish the controllership and financial management of the municipality and its local boards.
	Governance	Policies that establish the accountability, transparency, and governance structure of the municipality and its local boards. They may also provide for delegated authority from Council or be policies that impact Council Members directly.
	Municipal Service Levels	Policies that have a direct and significant public interest, will affect a large number of residents, and establish service levels for public facing processes.
CAO Approved	Accessibility	Policies that relate to the establishment of accessibility standards and processes, including municipal accessibility policies that are required by legislation.
	Corporate Administration	Policies that primarily relate to administrative processes, including how the municipality intends to comply and follow procedures to meet its legislated obligations.
	Facility Management and Operational Services	Policies that relate to the general administration (operations, management, usage, and allocation) of Town services, assets, and facilities.
	HR	Policies that relate to Human Resources activities and processes that are internally facing and include but are not limited to employment, payment, benefits, hiring, health & safety, equity, and human rights.
	Technology	Policies related to the internal usage, maintenance, management, and security of hardware, software, and infrastructure technology assets.

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### 3.2. Policy Requirements

- Policies, Procedures and Standard Operating Procedures shall be researched and drafted by the department that will be responsible for the administration and interpretation of the Policy, Procedure, or Standard Operating Procedure. In some instances, cross-departmental committees may be established for the development of Town Policies or Procedures.
- Policies and Procedures shall receive input from a Policy Review Committee and the Senior Leadership Team prior to approval.
- Policies, Procedures, and Standard Operating Procedures shall be written using a basic writing style and created on the templates prescribed by the Town Clerk.
- The Town Clerk shall be responsible for posting all policies and procedures, save and except for Human Resources and Technology policies, on the Town's website and maintaining the Town's Policy Manual in a digital format.
- Department Heads shall be responsible for maintaining a list of Standard Operating Procedures for their respective areas of oversight.

### 3.3. Administrative and Housekeeping Matters

- In accordance with Council Resolution #106-23, the Commissioner of Financial Services/Town Treasurer has the authority to approve administrative housekeeping changes to F 100 Investment Policy.
- The Town Clerk has delegated authority to make administrative amendments to Town Policies to ensure compliance as a result of changes to statute or regulations and shall be authorized to make minor corrections to eliminate technical or typographical errors or to make any other corrections that do not materially alter the intent and purpose of the original document.
- The Town Clerk has the delegated authority to determine the policy category and approval authority as described in Section 3 of this policy for all new policies recommended by Staff.

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This Policy is hereby approved by Council Resolution #XX-24 on this Day Number. day of Month, 20Last Two Digits of Year Number.

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