

Proposal for Recruitment Services

Municipality of North Huron

Attention: Sharon Chambers CAO

May 18, 2017

Submitted by:

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**To: Mayor Neil Vincent and Council
Township of North Huron**

**From: Nigel Bellchamber
N.G. Bellchamber & Associates Ltd.
Local Government Consultants**

Subject: CAO Recruitment Proposal for the Municipality of North Huron

Thank you for the opportunity to present a proposal for the recruitment of a new Chief Administrative Officer for the Municipality, as a result of the forthcoming departure of the incumbent CAO. Having helped recruit her to North Huron, I was somewhat disappointed that she had decided to leave, but also pleased to see her advance in her career.

Attached is the CAO recruitment process that I follow as appendix A. I have found that it works quite well, with the occasional modification to meet local circumstances and the nuances of positions. It contains more detail than this covering memorandum with respect to certain parts of the process, but the steps are essentially the same.

An essential part of your search process, in my opinion, is the front end research and the interviews with Councillors and with staff that report directly to the CAO, plus other key positions within the municipality. No two communities are alike in all respects, and a thorough understanding of both the community and the municipal corporation is required for a recruitment to be as successful as it can be. Although I performed this step for North Huron about 30 months ago, circumstances change, so I still think it is worthwhile.

I like to refer to the process as determining the right “fit”. It is very important. Fit with the nature of the work, fit with the Council, fit with the members of the Senior Management Team as a whole, fit with other direct reports, and fit with the community and its culture are all critical for success in the job.

I always interview each member of Council and relevant staff, individually, and review other reports and significant public documents before recommending a candidate profile and specific search strategy. In this case, if Council wishes, I would consider beginning the recruitment process before the interviews rather than dispensing with them as a whole.

The advertising venues are customarily the AMCTO, MWXTRA, and OMAA electronic advertising methods. The local papers are also essential in order to get word of mouth to interested applicants with a connection to the community that might otherwise not hear, as the preferred candidate may not be currently employed in the municipal sector in Ontario or Canada.

This front end work also allows me to determine not only the values, skills and behaviours that Council and the senior staff are seeking, but also the key projects that need to be addressed within the probationary period in order to gauge acceptable performance measures for a new appointee and which would form part of an employment agreement.

As I mentioned, a suitable candidate coming from outside the municipal sector should not be ruled out. However, the myriad of transparency and accountability provisions within which municipalities operate can add difficulty to the transition for someone without local government experience of some kind.

A schedule and estimate of cost is appended to this memorandum.

Having been a Deputy CAO and a CAO, and a Past President; and subsequently the part time General Manager for the Ontario Municipal Administrators' Association for eleven years, I think I have an excellent appreciation for municipal administration as well as the role of the CAO today, and numerous contacts within the profession. And, in my consulting practice, I have demonstrated an ability to assist many Councils with finding CAOs and Senior Staff that "fit" as well as designing organizational structures and processes that work well. In fact, I am proud that every appointee where I have assisted Council for over a decade has successfully completed his or her probationary period.

If you have any questions on this proposal I can be reached at 519-671-1189 or by email.

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Appendix A

N. G. Bellchamber & Associates Ltd

Chief Administrative Officer Recruitment Process

My usual process in assisting a Council with recruiting a new CAO proceeds with a number of steps as follows:

Step 1. Preparatory Research and Recommendations

Undertake a desk review of the municipality using sources such as Financial Statements, Statistics Canada, Municipal Website, Municipal Strategic Plan, news stories online, and recent Reports, Minutes and Agendas. Learn what potential candidates might also learn and be prepared to address any concerns they may raise.

Meet with the Head and each member of Council, and with senior staff reporting to the CAO to build the candidate profile.

Meet with the Council as a whole to outline the key qualifications and strengths that have been identified. Also interview the former or incumbent CAO if appropriate.

Advise Council on the appropriateness of its current compensation for the position and note if changes may be necessary to recruit a suitable candidate.

Recommend a strategy for advertising and for direct contact with key potential candidates, and propose a schedule for advertising, receipt of applications by the consultant, short listing process, interviewing, and finally negotiations leading to a likely start date for the successful candidate.

Step 2. Advertising, Calling and Shortlisting

Draft and place the advertisements, call potential candidates, receive applications, follow up with promising applicants and shortlist a group to be recommended for interviews. It is important that applications be addressed to me so that I can immediately upon receipt contact promising applicants.

Next I will meet with the Recruitment Committee to review all of the applicants and outline why short listed members are recommended for interviews, and why others are not. I would

add to the shortlist any that elected officials believe should be interviewed and delete others as they determine.

Confidentiality is critical throughout this process.

The best potential CAO candidates will likely be currently employed and not keen on having their current employers know they are seeking another job. As well, internal candidates may not come forward if they think their names will be broadcast if they are unsuccessful.

Any internal candidate that applies would normally be granted a place in the first interview group automatically.

And finally, staff who are junior to or who report to the CAO should not be involved in the hiring of their “boss” as a general principle. I have frequently been delegated the Clerk’s duties for the Committee and Council meetings and am thoroughly familiar with required procedures.

Step 3. The First Interview and Results

Develop the interview schedule with short listed applicants, prepare standard questions for Council or Committee interviewers, lead the interview process for consistency, review the candidates’ performance, and help develop a small second interview group if necessary from among the short listed interviewees following the initial interviews. Follow up with on line testing/profiling as required.

Step 4. Second Interviews

Repeat the process above for second interviews. Assist Council or Committee with selection of their preferred candidate(s). If the interviewing has been done by Committee, arrange for a meeting between the preferred candidate(s) and the entire Council when negotiations have been conducted by the consultant within parameters established by Council or Committee. References will have been checked by me. Also, the results of online psychological testing/profiling may be a significant factor at this point in the process.

Step 5. The Employment Agreement

Present to Council an employment agreement with the candidate to Council following his/her interview with the Council. The agreement would include such items as compensation, moving expenses, start date, holidays, education allowance, a performance evaluation process, probationary period, and severance terms for example. The municipal solicitor’s advice is usually sought on this document’s form. It is important that this agreement not be

distributed before Council has made it's "first" choice. Council can still change their position, but it is better not to have perceptions coloured by the agreement terms before the interview(s) in my experience.

General Comments and Principal Consultant Background

It is better to use a Committee rather than the entire Council, particularly if the Council has more than five members. A Committee in that case should include the Head and Deputy Head if there is one, and one other Councillor.

Municipal staff are often not present at the meetings as they are largely conducted in camera and if the Clerk, or Deputy Clerk, is not included at a meeting the Consultant is delegated the authority to take minutes by the Clerk.

Some of the municipalities I have conducted similar CAO search processes for include the Municipality of Huron East, the Town of Prescott, the Town of Haldimand, the County of Huron, the Town of the Blue Mountains, the Municipalities of Kincardine, Central Huron, Bluewater, Pelee Island, Lambton Shores, Wellington North, Guelph/Eramosa, Frontenac Islands, and in 2015 the Townships of North Huron, Black River-Matheson, Guelph Eramosa again (CAO took a new job), the Town of St. Marys and the Town of Mono. The mayors of each of the above would, I am sure, be happy to provide a reference and a selection is listed on the next sheet...

Myself, I have been a municipal CAO and Clerk (Counties of Middlesex and Huron) and Treasurer (City of London) and worked in local government for over 30 years for municipalities with populations ranging from 50,000 to 320,000. My consulting practice is fifteen years old and involves training, recruiting, dispute resolution, and strategic planning, primarily for municipal councils. I also contracted as the General Manager of the Ontario Municipal Administrators' Association (CAOs' organization) for 11 years and am the Past Member, Vice Chair and Chair the Canadian Public Sector Accounting Standards Board. As Chair of its Local Government Tangible Capital Assets Task force before joining the Board I submitted the report that led to the establishment of full accrual accounting for local governments across Canada which started most municipalities on the road to asset management.

Besides assisting numerous municipal governments I have undertaken projects for the Province of Ontario and have trained extensively for AMO since 2003.

I am also a principal in the firm Amberley Gavel Ltd which does staff training, closed meeting complaint investigations for over one hundred municipalities and serves as Integrity Commissioner for several.

I estimate the time from date of appointment of the consultant to Council announcement of new CAO to be approximately 60 days, but Council should always assume that the successful candidate will currently be employed and need to provide 30 days' notice to his or her employer.

I would be happy to answer any questions regarding any of the above.

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**Nigel Bellchamber
N.G. Bellchamber & Associates Ltd
Selected CAO Recruitment References**

<u>Municipality</u>	<u>Head of Council</u>	<u>Contact Info</u>
Kapuskasing	Mayor Al Spacek	705-335-2341
Lambton Shores	Mayor Bill Weber	519-649-6885
Guelph Eramosa	Mayor Chris White	519- 856-9951
Town of Mono	Mayor Laura Ryan`	519-941-3599
Wellington North	Mayor Andy Lennox	519-831-9612
St. Marys	Mayor Al Strathdee	519-284-2340

Estimate of Fees and Expenses North Huron CAO Recruitment 2017

Meet with members of Council and senior staff for development of profile.	1.0 days
Preparation and placement of advertisements	0.25 days
Receipt of applications, follow up with candidates, “cold calls” to prospects, review and analysis of applications	2.5 days
Meet with Recruitment Committee re shortlist	0.5 days
Plan and lead interviews with final shortlisted candidates	1.5 days
Reference checks, preliminary negotiations, arrange testing	1.0 days
Second Interviews and meet with full Council	1.0 days
Complete negotiations, prepare press release, report to Council	0.25 days
Guarantee of second candidate if selected candidate decides to leave within 6 months	N/C
Total	8.0 days
Estimated travel costs	\$ 300.00
Estimated advertising	\$ 1,600.00
Testing of Candidates	\$ 750.00
Fees 8.0 days @ \$2500.00	\$20,000.00
Total estimated cost before HST	\$ 22,650.00