

# Expertise for Municipalities

1894 Lasalle Blvd.  
Sudbury, ON P3A 2A4

support@e4m.solutions

Fax: 705-806-4000

www.e4m.solutions

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Mayor Piper & Members of Council  
Township of Nipissing  
45 Beatty Street  
Nipissing, ON P0H 1W0

By Email: [admin@nipissingtownship.com](mailto:admin@nipissingtownship.com)

## RE: HR-CAO-RFP 2021

Your Worship & Members of Council

Thank you for the opportunity to respond to your request for proposals for the management of your CAO-Clerk-Deputy Treasurer recruitment process.

Expertise 4 Municipalities (E4m) is a non-profit association of municipal experts. E4m's goal is to empower excellence in the municipal sector. In keeping with our status as a non-profit, 20% of all fees are kept within our organization for the express purpose of assisting small municipalities through subsidized workshops and related events. It is through this process that we know we can provide significant assistance and knowledge transfer to the sector.

We would like to work with you as you recruit to fill your most senior position.

### Our Understanding of Your Request

The Township of Nipissing is looking for a third party to assist Council in recruiting to fill the position of CAO-Clerk-Deputy Treasurer by:

1. Preparing and circulating an advertisement for the position;
2. Conducting a preliminary screening of all applicants;
3. Assisting with the establishment of an interview panel;
4. Facilitating interviews of potential candidates;
5. Recommending a preferred candidate to Mayor & Council; and
6. Negotiating an employment agreement with the preferred candidate.

## **Our Approach**

Within the sector, there have been many openings for a CAO position for municipalities in Southern Ontario as well as a few in Northern Ontario. Some of these municipalities have had challenges in filling the position with the “right” individual for the position. In fact, we are aware of a municipality in Northern Ontario that has attempted at least three (3) times to recruit a CAO/Clerk and they have not been successful. Once, they made an offer and the individual declined because they could earn more with another municipality and not have a blended role. Another time, the individual signed the contract and then resigned before the official start date.

Each time, they used a third party to advertise and screen candidates using a traditional process. The company also did reference checks. Yet they were unsuccessful.

We propose a different approach.

## **Our Proposal**

We propose using an approach that requires potential candidates to submit an EOI or Expression of Interest. The EOI is a document prepared by each interested candidate based on a series of questions related to the core competencies of the position and to municipal sector knowledge.

This approach requires a commitment on behalf of the candidate at the outset of the process. It assists in gauging willingness to work with the Municipality/municipal sector. It also provides more insight than can be gleaned from a cover letter and a resume.

## **The EOI Approach**

1. Meet with Council to understand Council’s overall expectations for the position and establish if Council or an Interview Panel will be involved in the process (including level of authority). And to determine/approve:
  - a. A budget for advertising the position.
  - b. The timeline/meeting dates.
2. Prepare the EOI document and create the evaluation scale.
  - a. Reviewed by Council or the Interview Panel.
3. Advertise for the position asking that anyone interested submit their name to receive the EOI document by a specified deadline date. Usually two (2) weeks from the date the advertisement goes in.

- a. We recommend using social and print media as well as local and sector specific publications.
4. On the specified date and time, the EOI is emailed to all who have submitted their name. They have one week to complete their submission.
5. Submissions are anonymized (to remove bias) and scored by Council or an Interview Panel and E4m human resource and municipal experts.
6. The top three (3) to five (5) are invited to an interview and are asked to submit their resume.
7. Interview questions are prepared based on responses in the EOI and the individual's resume.
8. If Council or the Interview Panel are not satisfied with the candidates, the next few on the list can then be considered.
9. If Council or the Interview Panel are able to determine the top two (2) at this point, the individuals are then asked to complete two (2) assessments: DISC and Prevue. The assessments look at personality and job fit.
10. A debrief is then held with Council or the Interview Panel to determine if the candidates are a good fit and to outline onboarding strategies. If a good fit is found, reference/ background checks are then completed.
  - a. Council can then make an offer. OR
  - b. The Interview Panel can then make a recommendation to Council and a subsequent offer can be made (unless the Interview Panel is given this authority at the outset of the process).

Timeframe

From the date of the initial meeting the overall process should take sixty (60) to ninety (90) days depending on the volume of candidates and assuming that each milestone is successful.

Fees

Our proposed cost:

|   |                |
|---|----------------|
| Initial meetings, EOI document preparation, support to Council/Interview Panel on scoring candidates & interviews | \$2,250        |
| Assessments (DISC & Prevue) with debrief & Onboarding Strategy preparation  | \$2,050        |
| Reference/Background checks & report (per candidate)  | \$1,835        |
| Contract Negotiation & Drafting/Legal Review of Employment Contract   | \$3,180        |
| <b>TOTAL</b>  | <b>\$9,315</b> |

**NOTES:**

1. Assumptions:
  - a. Sufficient EOI documents are received.
  - b. Council is able to make a decision during the first round.
2. Advertising costs are not included. The budget for this will be set with Council at the outset.
3. Reference and background checks are robust – going beyond work references. These are performed by Investigative Solutions Network.
4. The fee includes E4m HR experts and the fees for Paul Cassan, a Municipal and Employment lawyer with Wishart Law Firm LLP, in assisting with the drafting/review of the final contract. Cost may be reduced depending on the number of changes/meetings with Council required (legal fees are \$400/hr).

We look forward to the opportunity to work with Council.

Respectfully,



Peggy Young-Lovelace  
Director/Independent Consultant  
E4m