

CAO RECRUITMENT KICK-OFF MEETING

Tuesday, May 13th, 2025
Prepared for



Agenda

- **Waterhouse Executive Search – Overview**
- **Waterhouse Executive Search – Related Experience**
- **Executive Search Process Overview**
- **Executive Search Process - Phases One to Four Overview**
 - **Phase One – Stakeholder Engagement and Criteria Development**
 - **Phase Two – Candidate Identification (passive and active candidates)**
 - **Phase Three – Evaluation (recruiter)**
 - **Phase Four – Selection (committee)**
- **Round One Evaluation Approach – guiding principles**
- **Timeline and Key Dates (will adjust as needed)**
- **Questions to Consider**
 - **Point of Contact for Middlesex County?**
 - **Recruitment Committee Composition – Sub-committee or All of Council?**
 - **Stakeholders to Survey – Council Only or Council + Direct Reports to CAO?**
 - **Timeline and Key Dates – Confirm Dates?**
 - **Draft of Career Ad to consider?**

Why Waterhouse

Our Organization

- **National organization** – offices in Ontario, Manitoba and British Columbia
- **Firm focus** – broader public sector
- **Resources** - access to over 20 recruiting resources nationally, significant network
- **Process** – based on principles of transparency, diversity, equity and inclusion
- **Tools** – technology and tools to support the process – applicant tracking, psychometric assessments (leadership, job behaviors, emotional IQ)

Our Project Team

Lead Recruiter – Jon Stungevicius

- 39 recent CAO assignments
- 30+ C-level executives in health, social services, law enforcement

Supporting Recruiter – Grant Smith

- Former Municipal sector practice lead for PwC
- 40+ CAO recruitment assignments

Research Team

- Research Team to support recruitment

Related Experience

- **Town/Townships** - CAOs in Ontario and across Canada
- **Single/Upper Tier/Regional Government** – CAOs in Ontario and across Canada
- **Cities** – CAOs in Ontario and across Canada
- **Other community focused roles :**
 - **Healthcare** – hospital and community support organizations
 - **Social Services** – child welfare, mental health, youth services, Province of Ontario, etc.
 - **Law Enforcement** – policing and related oversight organizations

Our Value

- Experienced team
- Targeted, thorough, timely process
- Value for money – all inclusive flat fee
- 19-month replacement guarantee
- Supported by references
- Accessible Team

Our Related Experience

Single/Upper Tier

Single Tier

- CAO, City of Cornwall (2025)
- CAO, Municipality of Chatham-Kent (2022)
- CAO, Norfolk County (2021)

Upper Tier

- CAO, County of Elgin (2023)
- CAO, County of Essex (2023)
- CAO, Oxford County (2023)
- CAO, Bruce County (2022)
- CAO, United Counties of Leeds and Grenville (2021)

Cities

- CAO, City of Niagara Falls (2021)
- CAO, City of Whiterock (2020)
- CAO, Municipality of Sioux Lookout (2023)
- City Manager, City of Brockville (2019)
- CAO, City of Merritt (2019)
- CAO, City of North Bay (2017)
- CAO, City of Morden (2014)
- CAO, City of Selkirk (2014)
- CAO, City of Prince Rupert (2013)
- CAO, City of Williams Lake (2012)
- CAO, City of Yorkton (2014)

Other

- CAO, South Nation Conservation Ontario (2022)
- CEO, Toronto Regional Conservation Authority (2017)
- CEO, Walkerton Clean Water Centre (2014)

Towns/Townships

Towns

- CAO, Town of Erin (2024)
- CAO, Town of New Tecumseth (2024)
- CAO, Town of Orangeville (2023)
- CAO, Town of Whitchurch-Stouffville (2023)
- CAO, Town of South Bruce Peninsula (2021)
- CAO, Town of Centre-Wellington (2021)
- CAO, Town of Gravenhurst (2021)
- CAO, Town of Saugeen Shores (2020)
- CAO, Municipality of Kingsville (2020)
- CAO, Municipality of Port Hope (2020)
- CAO, Town of Bracebridge (2020)

Townships

- CAO, Municipality of Tweed (2025)
- CAO, Township of North Huron (2025)
- CAO, Township of Manitouwadge (2025)
- CAO, Township of Muskoka Lakes (2024)
- CAO, Township of Billings (2024)
- CAO, Municipality of Central Elgin (2024)
- CAO, Municipality of West Grey (2024)
- CAO, Township of Rideau Lakes (2023)
- CAO, Township of Frontenac Islands (2023)
- CAO, Township of South Frontenac (2022)
- CAO, Township of Wellington-North (2022)
- CAO, Township of Elizabethtown-Kitley (2022)
- CAO, Township of Adjila-Tosorontio (2022)
- CAO, Township of Minden Hills (2020)
- CAO, Seguin Township (2020)
- CAO, Township of Georgian Bay (2013)

Other Sectors

Community Hospitals

- CEO, Campbellford
- CEO, Chatham-Kent
- CEO, Erie Shores
- CEO, Geraldton District Hospital
- CEO, Mississippi River Health
- CEO, Norfolk General
- CFO, Northumberland
- CEO, Orillia Soldiers Memorial
- ED, Family Health Teams
- CEO, CCACs/LHINS

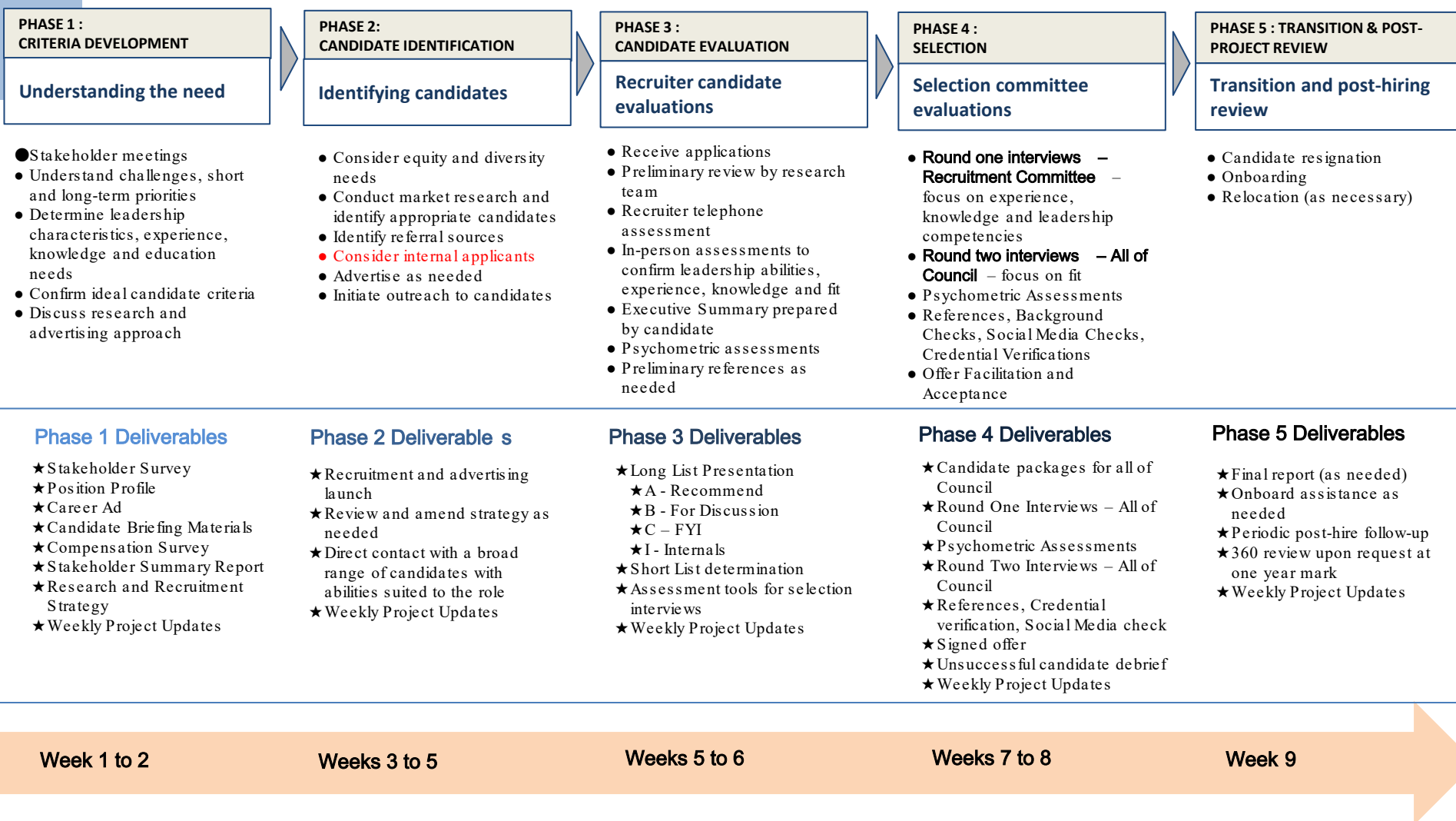
Social Services

- Children's Aid
- Autism
- Child/Youth Services
- Developmental Services
- Mental Health
- Ontario Government

Law Enforcement

- Deputy Chief, Anishinabek
- Deputy Chief, Greater Sudbury
- Director, CBSA
- Chief + Deputy Chief, Durham
- Civilian, Halton Regional
- Chief, Kawartha Lakes
- Chief, Lasalle
- Deputy Chief, Niagara Regional
- Chief, North Bay
- Deputy Chief, South Simcoe
- Chief + Deputy Chief, Surrey
- Chief, Timmins
- Chief, Wikwemikong
- ADM, Ontario Government

Our Executive Search Process



Phase One – Stakeholder Engagement & Criteria Development

Prior to Survey - General data collected

- Organizational Information
 - Strategic Plans, Financial Statements, etc
 - Organizational Chart
 - Key initiatives
- Community Profile
- Compensation, Benefits, Additional Attractors

Who we recommend surveying

- Mayor and Council
- Director reports to the CAO

Survey Questions – received via email/survey tool

- **Question 1** – What are the top three initial challenges or opportunities that the new CAO will be faced with in the first three months?
- **Question 2** - What are the top three to four objectives or success measures for the new CAO to accomplish within the first one to three years?
- **Question 3** - Is there any specific education, experience, knowledge requirements or leadership competencies that the ideal candidate should possess?
- **Question 4** - Is there anything else we should be aware of to ensure a successful search?

Survey Methods

- **Option 1 (preferred)** - Electronic Survey (followed by a video or phone discussion if needed)
- **Option 2** - Video or Phone Discussion (on request)

Phase Two – Sourcing Strategy

Research (Passive)	Advertising (Active)
<p>Ontario – Research (primary focus)</p> <ul style="list-style-type: none">▪ Upper tier municipalities▪ Single tier municipalities▪ Lower tier municipalities▪ Business Leaders who understand the municipal sector <p>National – Research</p> <ul style="list-style-type: none">▪ Western Canada (BC, Saskatchewan, Alberta, Manitoba, Alberta)▪ Eastern Canada (Newfoundland, New Brunswick, Nova Scotia, PEI)▪ Quebec <p>Level Targeted</p> <ul style="list-style-type: none">▪ CAO▪ Direct report to a CAO, Commissioner, General Manager, Director <p>Other Sources</p> <ul style="list-style-type: none">▪ Our Network▪ Referrals <p>Probable Outcome</p> <ul style="list-style-type: none">▪ 300+ research calls▪ 8 to 10 long listed	<p>Recommended</p> <ul style="list-style-type: none">▪ Waterhouse Career Site▪ Middlesex County Career Site▪ LinkedIn▪ Municipal World▪ Municipal Information Network▪ AMCTO▪ OMAA <p>Optional</p> <ul style="list-style-type: none">• AMO <p>Probable Outcome</p> <ul style="list-style-type: none">▪ 50 to 80 applicants▪ 2 to 5 long listed

Phase Three/Four – Evaluation & Selection

Phase 3 - Researcher/Recruiter

Stage 1 - Researcher

- Network – reputation
- Referrals - reputation
- Telephone Interview (experience)
- Resume (experience)

Stage 2 - Recruiter

- Telephone Interview
- In-person Interview
- Match against selection criteria (education, experience, knowledge, leadership attributes)

Phase 4 – Recruiter & Selection Committee

Stage 1 - Selection Committee -

- Reports
 - Executive Summary – candidate prepared
 - Resume
 - Assistance with assessment tools and questions
- Selection Committee Interviews
 - Round One (experience/ability)
 - Experience based questions
 - Round Two (fit)
 - Presentations
 - Fit Based Questions
 - Thomas PPA, TEIQ or HPTI – recommend for Round 2

Stage 2 – Referencing and Diligence

- Referencing (4 to 6), Criminal Record and Judicial matter, Education, Credit, Social Media + other record checking

Round One Evaluation Approach

Interview Format – Part one - total time of 60 minutes

- Recruiter to review the interview format – up to 1 minute
- Welcome from the Warden and selection committee introductions – up to 1 minute
- Formal questions from the select committee – 8 questions – up to 40 minutes
- Free format questions – Warden to chair - up to 10 minutes of free format questions
- Candidate Questions – up to 5 minutes

After Each Interview – Part Two up to 10 minutes

- Each committee member to share brief comments – up to 5 minutes – one minute per committee member
- Short break – 5 minutes

Final Selection

- **Committee picks least preferred candidate (#5, followed by #3, followed #3, etc.)**
 - Candidate with most votes (least preferred) is not considered further
 - Same process for next candidate
- **Committee discusses remaining two or three candidates**
 - Each committee member to share comments as appropriate
- **Selection**
 - Preferred candidates selected by a show of hands

Next Steps

- Preferred candidates forward to “Next Step” in the process

Guidelines

- Council members are encouraged to attend all interviews
- Round One - to be a “voting” member, participation is required in all interviews
- Round Two – to be a “voting” member, participation is required in all interviews

Key Dates (for discussion)

- [Week 1 – Kick-off meeting – Tuesday May 13th – one \(1\) hour \(in –person\)](#)
- Week 1/2 - Stakeholder Survey – Wednesday, May 14th to Friday May 23rd
- Week 1/2 – Career Ad Comments + Updated Career Ad – Thursday, May 15th
- [Week 3 – Stakeholder Survey Review – May 27th – one \(1\) hour \(in person\)](#)
- Weeks 3 to 5 – Ads and Research Launch (24 day posting) – May 16th to June 9th
- Week 5 - Ad closing (24 day posting) – June 9th
- Weeks 4 to 5 – Recruiter Interviews – May 26th to June 10th
- Week 5 - Long List Packages sent to the Selection Committee – June 11th
- [Week 6 – Meeting - Long List Review – \(virtual or in-person\) - 2 hours – June 12th or 13th](#)
- [Week 7 - Round One Short List Interviews \(virtual or in-person\) – 5 to 6 candidates](#)
 - Week of June 16th – propose June 19th or June 20th
 - Each interview is 60 minutes + a 10-minute post-interview discussion and debrief
- [Week 8 – Round Two Short List Interviews \(in-person\) – up to 3 or 4 candidates](#)
 - Week of June 23rd – propose morning of June 25th
 - Up to 3 or 4 candidates - 1.25 hours per interview
 - Post-interview discussion and selection
- Week 9 – References, Final Selection and Discussion of Offer Terms
 - Week of June 30th
- Start Date – one to three months

Questions to Consider

- **Who is the point of Contact for Middlesex County?**
- **Recruitment Committee Composition**
 - Sub-committee?
 - All of Council?
- **Stakeholders to Survey**
 - Council Only?
 - Council + Direct Reports to CAO?
- **Timeline and Key Dates**
 - Are we satisfied with the schedule?
- **Draft of Career Ad**
 - Comments or Approval?