

ISSUE BRIEF: INTERIM CAO WITH THE TOWN OF ONOWAY

Subject: Bloom's Services as Interim Chief Administrative Officer

From: Tim Duhamel, President, Bloom Centre for Municipal Education

BACKGROUND

Bloom Centre for Municipal Education (CME) stepped into the role of interim Chief Administrative Officer (CAO) for the Town of Onoway from May 2022 to September 2022. This contract enabled the Town to draw upon the experience of the Bloom CME team while recruiting a new CAO. Following the contract, the Town was now fully staffed with Bloom's recommended restructuring and significant improvements to many processes have been/are being implemented. All new staff hires were planned for at a budgeted amount that was less than past year's budgets..

BLOOM SERVICES AND VALUE ADDS

As part of the contract work, Bloom CME met and exceeded all expectations in the contract in the role of interim CAO. In addition, Bloom provided many services that helped build the capacity of the Town and its Administration at no extra expense. A typical interim CAO contract includes only one individual and significant changes or improvements are not expected. However, with the Bloom contract, in addition to the scope of the contract, Bloom provided the following value-add services:

- Full interim CAO, including double coverage (over and above the contract requirement);
- Improvements to the Council agenda package with the introduction of written reports;
- Council meeting procedural recommendations;
- Completed the 2022 budget, lowering the proposed tax increase from 11% to 3.5%;
- Recommended a reserve collapse and restructuring of the reserves to allow for the contractual obligations arising from council decisions to be paid. (CAO severance, legal fees, other severance obligations)
- Reviewed the organizational structure and made recommendations to adequately staff the Town to perform duties previously conducted by contracted staff;
- Completed the job description for the Corporate and Community Services General Manager and facilitated the hiring process;
- Facilitated governance training with Council;
- Facilitated Council team building and mediation;
- Drafted a Reserve Policy (approved by Council);
- Drafted an Employee Code of Conduct Policy (approved by Council);
- Completed the necessary calculations and drafted the Tax Rate Bylaw (proven accurate);

- Facilitated the strategic planning process with Council and drafted the strategic plan (approved by Council);
- Provided a Vision Action Plan template to administration to ease the process of creating staff projects to support the strategic plan; and
- Completed the CAO hiring process.

Bloom CME also offered free courses to staff while interim CAO and continues to support the Town of Onoway's Administration. This is a service that Bloom CME offers to their clients to support the education and success of municipal administrative professionals.

All the above services and value adds were at no additional charge to the Town of Onoway and were above and beyond the parameters of the contract. Typically, Bloom provides these services at an additional cost. These services did impact Bloom with costs as Bloom associates had to be paid for the work. This includes paying the fees of the team within the contract fees. Table 1 outlines the value of some of these services based on Bloom's typical rate.

Support Services	Value of Services
Reserve Policy	\$7,500
Staff Code of Conduct Policy	\$7,500
CAO Bylaw	\$5,000
Provided Council free access to Bloom 12 Part Elected Official Webinar Series	\$630
Provided Council Orientation Session (No Charge - incl. in CAO Interim Support)	\$7,875
Provided Council with a Strategic Plan (No Charge - incl. in CAO Interim Support)	\$15,750
Provided one free pass for Municipal Leadership Workshop (in Jasper)	\$1,260
Provided one free pass for Operating Budget Course (in Edmonton)	\$1,050
Provided new finance officer access to Bloom 10 Part Webinar Series	\$1,575
CAO Recruitment	\$10,000
Total Value of Services (included at No Charge)	\$58,140

Table 1: Value-Added Support Service (included at No Charge)

Bloom CME continues to provide support when requested and does so free of charge.

Table 2 shows the total amount that Bloom invoiced the Town of Onoway. This includes services provided after the contract ended. This table shows the cost of an additional team member who provided work at no charge to the Town. These costs were covered by Bloom.

Bloom Services	Invoiced Amount
Interim CAO Contract (6 months at 15k + accommodation)	\$87,538
Post Contract Support / Budget / General	\$7,657
	Total Invoiced
	\$95,195
Cost of Bloom Team Members	-\$28,967
	Net Revenue
	\$66,228

Table 2: Total Amount Bloom Invoiced to the Town of Onoway

FINAL COMMENTS

Tim Duhamel and the entire Bloom team would like to thank town council for the opportunity to serve them with interim CAO services.