

Recruiting Leaders



RECRUITMENT PROPOSAL SEARCH CONSULTANT FOR
PRESIDENT AND VICE-CHANCELLOR

RP-015-24



Paula Hynes
Presidential Search Committee
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May 8, 2024

the **vogel group**

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Introduction

Choosing a recruitment firm is not an easy or simple task. You need to partner with a firm who takes the time to truly understand who you are, the challenges ahead and the skills needed to excel in the role. You need to have confidence that the search professional leading your recruitment is not abdicating critical work to junior people. You need to know that research was conducted to identify relevant and appropriate talent without relying on recycling a pre-populated database. You need a search professional who proactively contacts prospective candidates instead of relying on hopeful responses to a posting. And you need a search professional with experience working with post-secondary institutions (PSI) to identify and attract outstanding leadership candidates.

Recently we were featured in Manage HR Magazine as having “A Transparent and Genuine Approach to Executive Recruitment”. We are immensely proud of Top Recruiter Canada recognizing The Vogel Group as the #1 Agency Recruiter in Canada in 2019 and Rick Vogel as the #1 Agency Recruiter in Edmonton in each of the past five years. We attribute this success to our three founding philosophies, namely:

Every search is led by a firm Principal (no junior staff).

Our search methodology rests on the purposeful and thoughtful assessment of personality, skills, experience, leadership style, intelligence, and emotional quotient (EQ) to match the best candidate for our client's organization.

Regular, transparent and comprehensive client communication is vital to a high-quality recruitment process and will lead to an outstanding candidate pool.

We partner with our clients from the deep discussion and analysis as to what is needed in the new leader, the soft skills and EQ required to fit exceptionally well, to the regular post-hire discussions to ensure the onboarding and orientation is as effective as possible.

We conduct research on a national or international scope depending on the client and role. Our track record for identifying and assessing outstanding talent from anywhere in Canada and attracting them to our clients is unrivaled.

Our industry leading client communication program keeps you informed and up to date every step of the way. There are no surprises, allowing effective and strategic process management to deliver your outstanding candidate pool.

Tracy Hussey will be your Search Principal from the initial meetings with stakeholders to the post-hire follow ups with backup from Rick Vogel. While the rest of The Vogel Group team is available for administrative support and coverage for illness or vacation, you will have one focused recruitment professional dedicated to your success.

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[REDACTED] We are confident The Vogel Group can deliver outstanding candidates to Memorial University for all your leadership recruitment needs.

Experience and Qualifications

History

Our company was founded over six years ago and brings over 30 years of senior search leadership. We have successfully completed over 400 search projects. Our client list includes post-secondary institutions, municipalities, healthcare, public companies, private companies, government, professional associations, regulatory colleges, not-for-profit organizations, boards, etc.

Our niche is not an industry or market sector. Instead, we specialize in leadership and the impact that brings to the culture of your organization. We know that leaders impact the people with whom they interact and bring more than just an individual contribution. Leadership. It's what we know, it's what we find, it's what we deliver. We will help you find leaders who will make your organization thrive.

Organizational Structure

Our organizational structure is unique. All members of the team are Principals; we do not have junior staff. Many firms utilize junior staff to leverage resources and increase capacity. We know that our clients experience better project service delivery and higher quality candidate pools when more experienced, seasoned, and senior search professionals are involved with every aspect of the search process.

This corporate structure is the result of our philosophy and values. In an industry that has long lived the belief that bigger is better, we continually prove otherwise to our clients through a deeper and more personal relationship, high touch communication and a transparent and tailored search process that has delivered outstanding candidate pools from across the country for a diverse range of industries and leadership roles. Our quality level of client service, our national reach and scope combined with more than 30 years of leadership search experience positions The Vogel Group to deliver the successful recruitment results our clients deserve.

We have offices in Edmonton, AB and Hamilton, ON.

Relevant PSI Experience

Our successful track record recruiting a wide range of leaders for post-secondary institutions speaks for itself. We are experienced and comfortable in this sector and understand the nuances and uniqueness of the PSI sector. We think it is important to note the number of organizations who have partnered with The Vogel Group on multiple projects evidencing the quality of our work as they continue to choose our firm as their search consultant:

Athabasca University

Vice President, Finance & Administration and CFO

Chief Governance Officer and General Counsel

Associate Vice President, Communications & Marketing

Director, Decision Support
 Director, Financial Reporting & Operational Services
 Manager, Financial Planning & Budgets

MacEwan University

Associate Vice President, Students
 Dean, Faculty of Fine Arts & Communications
 Athletics Director

Medicine Hat College

Vice President, Academic & Provost
 Dean, Business & Continuing Studies
 Dean, Health & Community Service
 Dean, Science and Health

NorQuest College

Director, People & Talent Operations

Robertson College

Chief Financial Officer

In addition to these PSI clients, The Vogel Group has had the privilege of working for the following public sector clients in the recruitment of a wide range of leadership positions:

CIVIDA (formerly Capital Region Housing) (1 search engagement)
 Edmonton Screen Industries Office (8 search engagements)
 Government of Alberta (1 search engagement)
 Mikisew Cree First nation (2 search engagements)
 Office of the Auditor General of Alberta (9 search engagements)
 Parkland County (3 search engagements)
 Town of Drayton Valley (1 search engagement)
 Town of Edson (2 search engagements)
 Town of Hinton (1 search engagement)

In addition, our current website lists 190 successfully completed leadership recruitments for 88 listed clients. Analyzing this data reveals 56% of our clients have chosen The Vogel Group for more than one recruitment. We have eight (8) clients who have engaged our firm for five (5) or more leadership assignments.

Our Commitment to Diversity

We understand and appreciate our clients' ever-increasing desire for candidates who reflect the communities in which they work and live. The Vogel Group is committed to inclusivity and diversity as we search for outstanding leadership talent for our clients.

We encourage candidates of all ethnicities, cultural backgrounds, physical challenges, sexual orientations and identifications to feel confident in exploring and declaring candidacy for any of our search assignments.

Our Land Acknowledgement

We at The Vogel Group acknowledge that in Hamilton we work and live on traditional lands of the Erie, Neutral, Huron-Wendat, Haudenosaunee and Mississaugas. This land is covered by the Dish with One Spoon Wampum Belt Covenant, the agreement between the Haudenosaunee and the Anishinaabek to share and care for the resources around the Great Lakes. We recognize their commitment to these lands and vow to do our best to continue this tradition and commit to working towards Truth and Reconciliation as they see it.

Equity, Diversity and Inclusion (EDI) Goals

Our goal is to support, encourage and involve potential candidates with dignity, respect and care. We aim to either match the diversity found in the hiring community or exceed it. All of our team members have had significant EDI training and are committed to supporting all candidates in the way they ask to be supported.

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We use an intersectoral lens to approach all discussions with potential candidates and have received feedback that our approach is effective.

Service Specifics

Preliminary Research

The first step in our process is to meet with you and anyone you feel appropriate to have an in-depth discussion about Memorial University (Memorial), your history, culture, organizational structure, challenges, and goals ahead. We want to explore and understand what skills, experience, characteristics, leadership style and personality are desired in candidates for any position you seek to fill. This is the most critical step in the search process. It is important because we need to know what to look for as we search for exceptional candidates who will fit Memorial seamlessly. However, it is also important because over the course of the project, we are representing Memorial to the marketplace. We see ourselves as your ambassadors and we don't take this lightly. We want to ensure that we tell the Memorial story in an accurate and compelling manner.

With the information gathered from the preliminary research discussions along with any job description you may have provided us, we will prepare a draft Position Profile for your review. We will then finalize the Profile and use it as our primary guide throughout the search process.

We will post the opportunity on our website and work with you to develop an appropriate marketing campaign. We will also post it on our corporate social media sites (Twitter, LinkedIn). While some targeted industry-specific advertising can be valuable (such as Academica), there is no substitute for thorough research to identify individuals and then personally reaching out to them.

Candidate Identification

Once the Profile is approved, we will begin research to identify potentially qualified individuals. We will utilize our current database and our personal and professional networks, but the most significant work will be in conducting research specific to the requirements of the Profile.

Throughout the search process, we will provide you with a weekly report comprised of two components. The first is a written commentary of the past week's activities. This can include information regarding areas we have covered in our research, the number of individuals contacted, how many of them have received the Profile and any market feedback we receive regarding Memorial and/or the opportunity. In addition to the commentary, a current report will be attached listing every individual we have identified, their current position and company and a brief comment about their status in the search (declared candidate, considering the opportunity, not interested, etc.). Every individual is categorized as High, Medium or Low priority giving you an easy-to-read yet detailed debrief on the search. You will never wonder what's happening in the search.

It is important to note that we do not rely solely on the weekly report. We will be in regular contact by phone or email throughout the process.

Candidate Evaluation

Every individual who applies and whose qualifications are relevant is contacted to conduct a preliminary pre-screen discussion. This conversation will identify those candidates worthy of an in-depth interview conducted either in person or by Zoom/Teams. Those who do not advance to the in-depth interview will be closed out in a professional, timely and constructive manner.

We will continue to assess every qualified individual who expresses interest. Our goal will be to provide you with three to five qualified, interested and recommended candidates for the role.

As a results-based search firm, should an outstanding candidate or two come forward early in the process we will discuss with you the potential of fast tracking the next steps so as not to lose them as we pursue other potential candidates in order to hit an arbitrary goal of three to five candidates.

We will provide you a written Candidate Summary of all recommended candidates. This summary will contain the candidate's resume as well as a written report as to why they are being recommended. It will address their motivation, background, personality, relevant experience and their compensation expectations.

At the heart of our award-winning recruitment process is our weekly reporting. At the end of every week, we provide you two-part detailed report consisting of:

1. A PDF list of every person who is associated with your project including potential candidates, declared candidates, sources of referrals and unsolicited submissions. The declared candidates are rated as high, medium and low so that the report can be read quickly.
2. A commentary of the week's activities. You will know how many people we have contacted, who has declared candidacy and who has declined. We will qualify all promising candidate assessments. We will provide any feedback we hear in the marketplace regarding Memorial. Most importantly, we provide an ongoing status update as to where we are in the recruitment so, together with your Search Committee, we can plan, schedule, and anticipate the next steps in the process.

Interviews/Final Selection

Once you have selected which candidates you wish to interview, we will work with you to prepare an appropriate interview guide, schedule the interviews and facilitate them either at your offices or ours.

Should you require further steps (second interviews, formal presentations, informal meetings, etc.) for some or all the candidates, we will work with you to develop an appropriate "next step" for your assessment.

We will conduct in-depth reference checks on any/all requested candidates as well as initiate third party background checks, if so desired. We will provide written Reference Reports as well as written background checks for any requested candidate.

Once you have selected your candidate of choice, we will help you extend the offer and will close out all unsuccessful candidates. The regretting process is critical as it must be done professionally and with integrity as it will represent both Memorial and our company in the marketplace.

After the successful candidate has signed an offer and begins their Day 1 at Memorial, we will stay in contact with both client and candidate at **regular intervals** throughout the first year.

Timeline

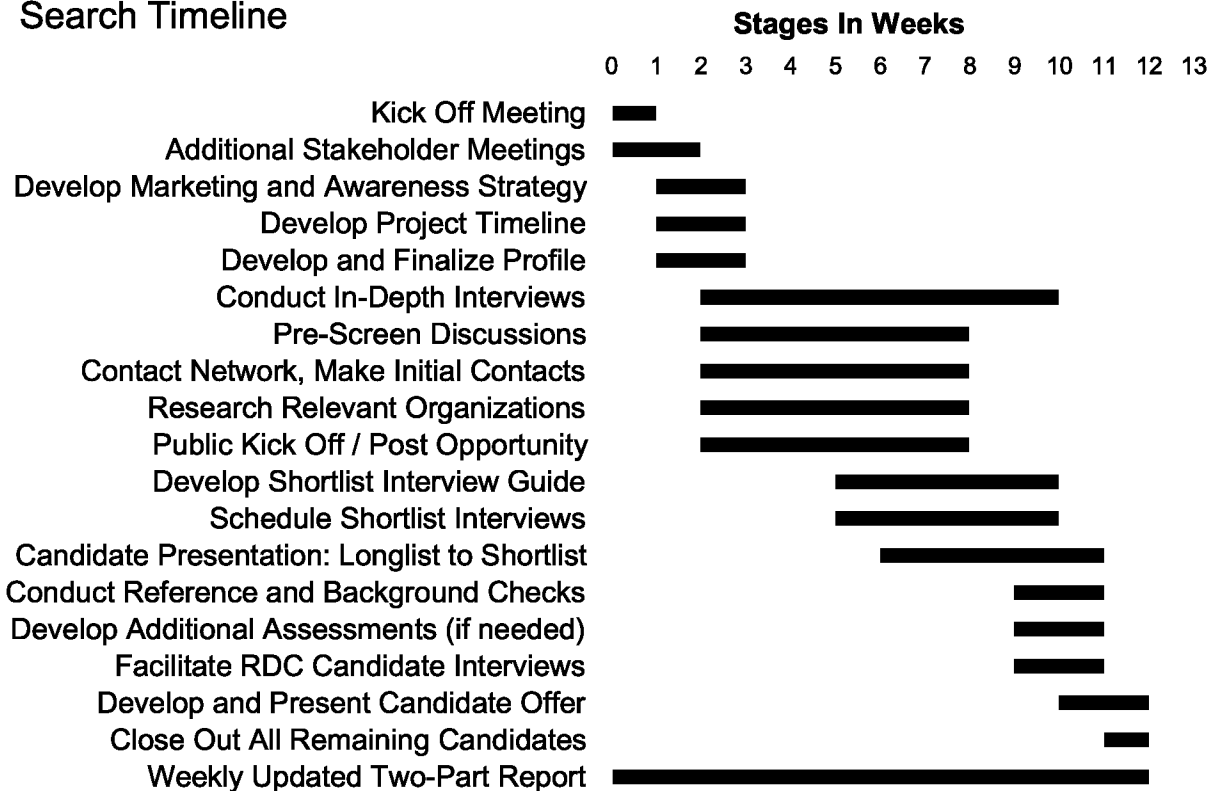
We have included a table below that sets out the stages of our work, an approximate timeline, and the deliverables associated with each stage. You will see that we estimate a total process of approximately 10 to 12 weeks. However, timelines vary from search to search.

Generally, we would like to have the profile completed and approved in the first week of the search. While our research and sourcing are activities which never really stop, we usually allocate up to six weeks for this stage.

The research and assessment truly overlap as identification, pre-screening and full assessment is an ever-moving phase. While there are some things we can control to keep timelines tight, the biggest factor is beyond our control: the responsiveness and schedules of both the candidates

and the client alike. This can sometimes be exacerbated in the summer months, but we work diligently to mitigate this as much as possible. Again, we hope to be able to deliver a short list to you within eight to ten weeks of the Profile approval.

Search Timeline



There are several factors that can significantly impact the timeline of the search process including:

- Responsiveness of the Search Committee;
- Availability of Search Committee (multiple calendar juggling);
- Time of year (summer vacations, holiday season); and
- Geographic location of candidates (relocation issues).

Weeks 1 to 2

Meet with Memorial (and any other suggested individuals and/or stakeholders) to garner a deep understanding of Memorial's structure, culture, challenges and goals as well as desired experience, skills, personality and characteristics in qualified candidates;
 Develop an approved (by Memorial) Position Profile;
 Develop and implement the approved advertising, social media, posting and awareness campaign; and
 Begin research and identification of potential candidates.

Weeks 2 to 8

With Profile approved, continue to source and identify potential candidates;
 Reach out and connect with potential candidates to discuss Memorial's opportunity and explore interest; and
 Those who express interest by submitting a cover letter and CV will be preliminarily assessed by phone. Candidates passing the pre-screening process will be further assessed through an in-depth behavioral interview either in person (if local) or via video conference (Zoom/Teams).

Weeks 3 to 8

By the end of this time period (if not before), provide Memorial with a list of all declared candidates; in addition, provide a recommended top 8 to 10 candidates for whom we will provide written candidate packages (these include their respective cover letters, CVs, credential verification via transcripts and a report explaining our recommendation).

Weeks 8 to 10

Memorial will conduct interviews of selected candidates; and
 The Vogel Group to conduct reference checks on selected candidates and provide written Reference Reports to Memorial.

We believe this schedule is reasonable and while we are committed to meeting (or beating) this timeline, we will not sacrifice the quality of the candidate pool just to meet predetermined dates. As a **results-oriented** recruitment firm we will provide appropriate recommendations throughout the process.

Quality Assurance

The most critical step in assuring quality of the recruitment process is committing the time upfront in the data gathering/Profile development phase. It is not uncommon for a search firm going to market without truly knowing what they are looking for. The Vogel Group will want to meet with all stakeholders and influencers for any search project for which we are engaged. Engaging with all those who can add value to our understanding of the role, its challenges, resources, culture, and history is the most important component of ensuring the quality of the candidate pool presented.

On an ongoing basis, the weekly reporting continues to ensure the quality of both process and candidates remains at the highest quality.

While our process has helped The Vogel Group be recognized as a Top Recruiter, we endeavor to find ways to improve how we do what we do. Twice a year, we spend a day to review our social media utilization, our research and sourcing technology and process, our current technology and our client reporting system. We take the time to ask the question “can we do this better?” We look to our clients to find out other areas in which we can add other services.

Psychometric Testing

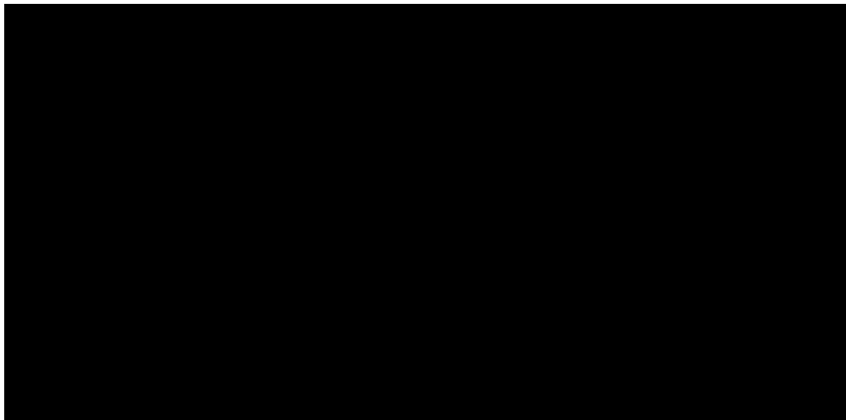
Included in our professional search fee is a one-time Organizational Benchmark analysis which establishes traits needed to succeed in this particular role, and individual Candidate Analyses to compare to the Benchmark. The Vogel Group will provide this service for up to three shortlisted candidates.

The Vogel Group uses PXT Select as it’s psychometric assessment tool. We offer it (as presented above) to clients who wish to add this to the assessment and evaluation of candidates.

PXT Select assessments help companies translate job requirements into measurable cognitive and behavioral traits to find the ideal candidates with the best fit for each role.

The Vogel Group is continually analyzing and testing various psychometric/personality systems as a potential added tool to our process. We do not believe that these tools are developed, accurate and reliable enough to replace face-to-face interaction and assessment. We offer it as “supplemental information” for clients wishing this information.

References



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Pricing and Scope of Work

Our standard professional fee is 25% of the projected first year anticipated total cash compensation for the successful candidate. While we may not be the lowest cost search provider available to you, we believe our fees are competitive and we bring tremendous value to our clients.

s. 40 (1) [REDACTED] we are offering a fixed rate of \$49,000.

Any direct, out-of-pocket expenses or disbursements such as advertising, candidate and consultant travel/accommodations and third-party background checks will be billed as incurred without any additional mark-up. These fees will only be incurred with your authorization.

Guarantee

If within twelve months of the successful candidate's start date, their employment terminates for any reason other than downsizing, restructuring, merger, or other change of control within the applicable guarantee period, we will conduct a one-time search for their replacement at no additional cost to you. Prior to committing to any such refill, however, we would work with you to determine the reasons behind the departure and ensure that all steps were taken by you to ensure a successful on-boarding and integration into the role. This guarantee provision is only applicable if the Retainer and Balance are paid in full within 30 days of invoicing.

Cost Saving

Many search firms charge an administrative fee (typically 5% to 12% of the search fee) for search-related expenses including administrative support, printing, and copying, courier usage, search assessment and research services. We believe that these costs are part of doing our job. We also believe in transparency. Accordingly, The Vogel Group does not charge such a fee which is a cost saving to our clients.

The Vogel Group cares about our environment and the problem of waste. We are a paperless company. We do not have any filing cabinets in our office. Our database for both project files and candidate information are stored in the cloud. This not only reduces the day-to-day waste of paper but it also eliminates the need for external storage (boxes, storage rooms) that accumulates over time.

While COVID certainly prioritized the need for remote interviews and meetings, The Vogel Group has been utilizing this resource since inception to reduce the cost of travel for our clients. Before making the commitment to incur the expenses of bringing short list candidates for in-person interviews, we (along with our clients) can conduct various levels of candidate assessment virtually, thereby reducing expenses for our clients.

Cancellation

This engagement may be cancelled by written notice at any time by either party. If the engagement is cancelled by Memorial more than 60 days after the date of this Engagement Agreement, a fee equal to the Retainer will be billed and due upon receipt.

Candidate Verification

Memorial understands that past employment is not formally verified except through references provided by the candidates. Memorial also understands that candidate provided information is not independently verified except as specifically noted. Memorial bears full responsibility for deciding which candidate, if any, to employ.

Exclusivity

This engagement is being conducted on an exclusive basis. Memorial affirms that no other search firms are, or will be, engaged on this assignment. Any and all candidate expressions of interest will be provided to The Vogel Group to manage. To that end, we want to ensure all candidate resumés including any internal candidates either identified by you or who indicate interest in the role directly to you be forwarded to us to ensure the most qualified candidates are properly evaluated against our search mandate.

Second Hire

Should you hire more than one from the pool of candidates presented within 12 months of the commencement of our engagement, we will charge a discounted fee of 18% of the first year's total cash compensation (base salary plus target annual bonus) for each additional candidate employed.

Confidentiality

The Vogel Group will take all reasonable precautions to safeguard any and all confidential information provided by Memorial, where the information is reasonably understood to be confidential in nature and not available, or disclosed, to the public.

Privacy

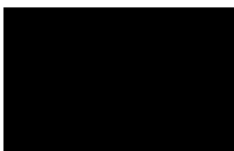
The Vogel Group is committed to ensuring that the privacy of our clients and candidates' personal information is protected. We adhere to the standards and expectations set out under the Provincial *Personal Information Protection Act* and other applicable laws, including applicable federal laws. Any candidate personal information provided to Memorial is for the exclusive use in relation to this assignment. The personal information of candidates may not be used for any other purpose, and may not be communicated, transferred, or disclosed outside of the Memorial organization for any reason.

Conclusion

Thank you for the opportunity to compete for your business. Again, we are confident we can deliver an outstanding candidate pool for your consideration and would be pleased to answer any questions you may have as you make this important decision.

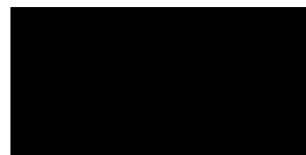
Sincerely,

The Vogel Group



s. 40 (1)

Tracy Hussey, MSc, RD, RPR, CCIP
Principal
289.238.9407
tracy@thevogelgroup.ca



s. 40 (1)

Rick Vogel, ICD.D
Founding Principal
780.665.4965 ext. 101
rick@thevogelgroup.ca

Appendix A: Team Bios

Tracy Hussey, MSc., RD, RPR, Principal

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Your search Principal will be Tracy. She has worked in non-profit leadership positions for almost 20 years. [REDACTED]. She is a member of the Human Resources Professional Association and has the Professional Recruiter designation. She recently passed the exam to become a Canadian Certified Inclusion Professional.

[REDACTED]

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Tracy holds a Master's

Degree in Health Sciences and has several publications.

[REDACTED]

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Rick Vogel, ICD.D, Founding Principal

Rick is the Founding Principal of our firm and [REDACTED]

[REDACTED]

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Rick holds a bachelor's degree from the University of Alberta, and prior to joining the search industry spent 20 years in the financial services industry in both Canada and the United States.

[REDACTED]

s. 40 (1)

He is an active member of the Institute of Corporate Directors and [REDACTED]

[REDACTED]

s. 40 (1)

France Bourgeois, Principal

[REDACTED]

s. 40 (1)

Lori Poulin, Project Coordinator / Office Manager

Lori brings 21 years of executive administration, office management, client and talent engagement to the team. [REDACTED]

[REDACTED]

s. 40 (1)

Appendix B – Submission Form

1. Proponent's Information

Please fill out the following form, naming one person to be the Respondent's contact for the Open Call process and for any clarifications or communication that might be necessary.	
Full Legal Name of Respondent:	The Vogel Group
Any Other Relevant Name under which Respondent Carries on Business:	
Street Address:	1 Hunter St Ground Floor
City, Province/State:	Hamilton ON
Postal Code:	L8N 3W1
Phone Number:	289.238.9407
Fax Number:	none
Company Website (if any):	www.thevogelgroup.ca
Proponent's Contact Name and Title:	Tracy Hussey, Principal
Proponent's Contact Phone:	289.238.9407
Proponent's Contact Fax:	none
Proponent's Contact Email:	tracy@thevogelgroup.ca

2. Offer

The Proponent has carefully examined the Open Call documents and has a clear and comprehensive knowledge of the Deliverables required under the Open Call. By submitting a Proposal, the Proponent agrees and consents to the terms, conditions and provisions of the Open Call, including the Form of Agreement, and offers to provide the Deliverables in accordance therewith at the rates set out in the pricing section.

3. Rates

The Proponent has submitted its rates in accordance with the instructions in the Open Call. The Proponent confirms that it has factored all of the provisions of Appendix A, including insurance and indemnity requirements, into its pricing assumptions and calculations.

4. Addenda

The Proponent has sub is deemed to have read and accepted all addenda issued by the Owner. The onus is on bidders to make any necessary amendments to their bids based on the addenda.

The bidder is required to confirm that it has received all addenda by listing the addenda numbers on the following line:

Bidders who fail to complete this section will be deemed to have not received all posted addenda and shall be deemed non-compliant.

5. No Prohibited Conduct

The Proponent declares that it has not engaged in any conduct prohibited by this Open Call.

6. Disclosure of Information

The Proponent hereby agrees that any information provided in their Proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The Proponent hereby consents to the disclosure, on a confidential basis, of this Proposal by the Owner to the advisers retained by the Owner to advise or assist with the Open Call process, including with respect to the evaluation of the Proposal.

7. Proposal Irrevocable

The Proponent agrees that its proposal shall be irrevocable for a period of 90 days following the Submission Deadline.

8. Required Signatures

Failure to submit this signature section will render the Proposal NON-COMPLIANT and the Proposal will be disqualified.

Tracy Hussey

Name of Proponent's Representative

Principal

Title of Proponent's Representative

July 20, 2023



s. 40 (1)

Date

I have the authority to bind the Proponent.



ROYER THOMPSON

PEOPLE ARE OUR PURPOSE

The Services of a Search Consultant for
a New President and Vice-Chancellor
RFP-015-24



100 Water Street
St. John's, NL A1B 3X9
Canada

May 15th, 2024

Attention:
e: opencalls@mun.ca
Memorial University

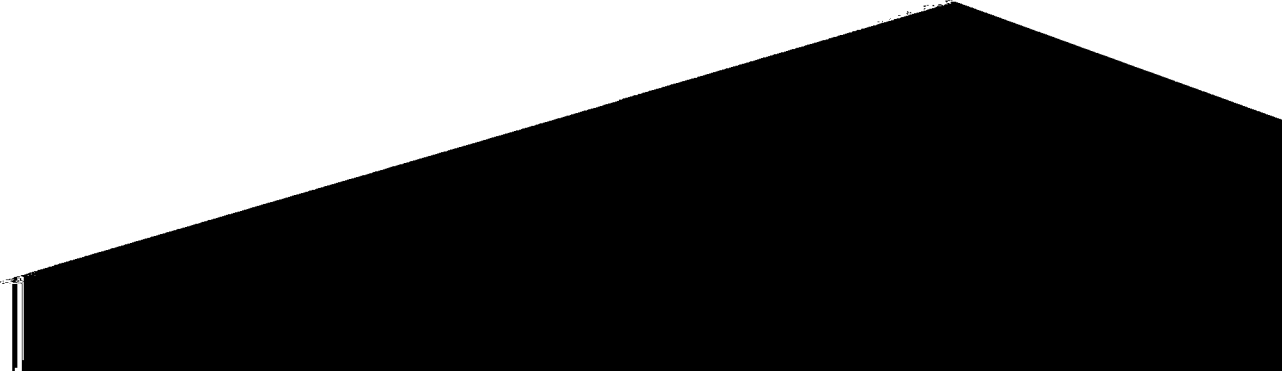


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Letter of Introduction

May 15th, 2024

Strategic Procurement Office
Financial and Administrative Services
Memorial University

Dear Memorial University Representatives:

We would be thrilled to support Memorial University in successfully recruiting your next President and Vice-Chancellor. An outstanding university president is foundational to everything that happens within the institution, including setting a compelling direction, ensuring financial sustainability, presenting a galvanizing force in the community, and attracting and retaining top faculty, staff, students, researchers, and funding.

We agree with much of what Peter McInnis says in his recent article on the CAUT website: "The malaise in post-secondary administrative recruitment". Lack of rigour, lack of consultation, lack of information, and lack of transparency by many search firms are destabilizing Canadian universities. Executive recruitment firms, particularly those supporting universities with senior administrative and academic searches, must be held to account and do better. We accept the criticism and embrace the challenge of doing better.

At Royer Thompson, we've never had a failed academic or administrative search, nor have search committees not reached unanimous agreement on their top candidates. This is not because we, on our own, are unique. Rather, our process is comprehensive - from community consultation, outreach to candidates nationally and internationally, and in vetting of applicants, we are rigorous.

But what search committees (and candidates!) tell us distinguishes Royer Thompson is that we share all information transparently with search committee members; we invite scrutiny and support an environment that is safe to challenge and engage fully so that everyone has the same information on which to make decisions. This starts with agreement on the role requirements and transparent evaluation criteria, with all assessments made available to all search committee members.

This does not mean it is easy to attract top leaders, nor does it mean the competition for leaders isn't acute within the post-secondary sector. The systematic challenges within the post-secondary sector have been heightened in recent years due to government policy changes, demographics, cost pressures, and structural challenges. All of which necessitate strong leadership and a clear path forward. For that, we have developed a unique approach that mitigates risk and creates strong matches that align with what the institution needs for its next five years.

At Royer Thompson, we leave no stone unturned. Our academic search practice is characterized by sophistication in understanding institutional needs, sourcing, rigour and due diligence, thoughtfulness, risk management, care for candidates, and partnering closely with search committees, ensuring transparency and trust throughout the process.

Other considerations include:

- Our firm places a premium on understanding the university context and the requirements for a leader to be successful.
- We emphasize stakeholder and community consultation at the outset to inform the recruitment strategy, create a compelling narrative, and build alignment on the university's future.
- We are thorough in completing 360-degree reference checks and leadership assessments on short-listed candidates before the search committee meets them, mitigating risk and disappointment.

- We have a proven track record of identifying candidates who make long-term commitments, contribute positively to the university, and become active community members.
- We are committed to providing search committees with diverse candidates.

When leadership matters, we are the trusted advisors to search committees in academic leadership recruitment and onboarding. We welcome the opportunity to meet with you to discuss a productive partnership. Please let us know if you have any questions. You can reach me directly at 902-220-3232 or kwest@royerthompson.com

Sincerely,



s. 40 (1)

Kim West, President

Our Understanding

At Royer Thompson, we are inspired by Memorial University's unwavering commitment to fostering knowledge, innovation, and social responsibility. We also acknowledge that, as Newfoundland and Labrador's only university, it has a special obligation to the people of the province, its society, and its economy while striving to shape a brighter future for Canada and the world. We have extensive experience in offering all the considerations stipulated in Appendix A, including the scope of service and deliverables.

The role of Memorial University's future President and Vice-Chancellor will be critical in fostering an inclusive academic community dedicated to innovation and excellence in teaching and learning, research, scholarship, creative activity, service, and public engagement in a multicampus and multidisciplinary learning environment. This appointment will be pivotal, considering Memorial University's remarkable breadth and depth of educational programs and student body of over 19,000 students from more than 115 countries across its six campuses and online platforms.

As an experienced and reputable Canadian executive search firm, we are aware of the recruitment and retention challenges experienced by Canadian post-secondary education institutions and acknowledge the importance of transparent and inclusive practices to uphold the core principles of higher education. Through close and transparent collaboration with the Presidential Search Committee and the broader academic community, we aim to identify the unique blend of leadership experience, strategic thinking, interpersonal skills, academic excellence, values, and mission alignment required for Memorial University's future President and Vice-Chancellor.

Appointing the right President for a higher education institution is paramount, as it serves as a catalyst for attracting and retaining top talent in academic leadership positions. The right appointment can elevate the institution's reputation, making it an attractive destination for top-tier educators and administrators, thus ensuring its long-term success and impact in the ever-evolving landscape of higher education.

We also know that research is at the heart of Memorial's mission, particularly in ocean-related studies, where it collaborates on groundbreaking initiatives like the Ocean Frontier Institute and Canada's Ocean Supercluster. Memorial's dedication to fostering talent is evident in its substantial investment in graduate fellowships and its recognition on the global stage, with 64 researchers listed among the World's Top 2% Scientists.

Memorial University's entrepreneurial spirit is reflected in many accolades earned by its faculties for their impactful contributions to society, from prestigious awards like the Arctic Inspiration Prize to successful ventures like HeyOrca and Solace Power. Furthermore, Memorial's commitment to teaching excellence is reflected in its distinguished faculty, with numerous recipients of national teaching awards and fellowships.

The university's internationalization efforts enrich its academic community, with over 3,400 international students contributing to a vibrant exchange of ideas and cultures. This commitment to global engagement extends to partnerships with over 125 institutions worldwide and the establishment of a campus in the United Kingdom, further solidifying Memorial's place on the global stage.

In addition to its academic prowess, Memorial University serves a critical role in driving economic growth and societal advancement through initiatives like the Genesis Centre and the Navigate Entrepreneurship Centre, which nurture innovation and cultivate entrepreneurial talent.

Memorial's stellar performance in global rankings, including its recognition in the Times Higher Education Impact Rankings and the Shanghai Ranking, reaffirms its standing as a world-class institution dedicated to excellence in education, research, and public engagement.

While Memorial University has many advantages, it is not immune to the challenges confronted by all post-secondary institutions in Canada. Memorial University has historically been a driving force in Atlantic Canada in fostering global awareness and understanding and bridging educational, cultural and business awareness and understanding. Retaining its leadership position in Atlantic Canada and globally is essential going forward.

Our recent executive search experiences in academia have informed us that incoming presidents must adeptly navigate transformational changes in learning methodologies, fluctuations in provincial government allocations for international student permits, and fundraising dynamics. Essential to their strategic trajectory is ensuring financial robustness, advancing academic innovations for student achievement, championing EDIA (Equity, Diversity, Inclusion, and Accessibility), decolonization and reconciliation, and cultivating pivotal community and philanthropic partnerships. We would anticipate exploring these themes as part of the community consultations.

These challenges are not unique to Memorial University, of course, but they are highly relevant and complex. Based on our work with universities over the last 24 months, we understand the following themes to be prevalent in recruiting leaders:

- Aligned university and academic plans with implementation timelines and resource allocation.
- Enrollment plan – particularly with federal government international student caps.
- Faculty and staff retention, as well as enhanced morale and culture.
- Sustained high-profile and well-funded research partnerships.
- Constructing a path to financial sustainability.
- Proactive partnerships with alumni and donors.
- Targeted investments in data-driven student recruitment.
- Program innovation and resource allocation.
- Support for collegial and inclusive relationships across the institution.

The aftermath of COVID has created new challenges for Canada's university sector, including risks to gaps in the financial model, inflationary pressures on labour and operating expenses, more competition for fewer students, barriers for international students to come to Canada, student housing and cost of living, and the requirement for greater agility and adoption of technology, innovation, and digitization. Against these forces, the ability to recruit, onboard, and support exceptional leadership has never been more critical. Based on our decades of experience, we know that a positive, inclusive, and collegial culture is jet fuel for an organization, especially within a university governance structure and context.

Experience and Qualifications

Royer Thompson is a Canadian executive advisory firm focused on capturing the full potential of people in pursuit of leadership and organizational excellence. We have a proven record of successful placements for academic institutions, and complex presidential and chief executive officer searches. All our searches are national or international in scope.

Our search process is rigorous and detailed and ensures:

- Partnership: our team partners with boards, senior management, human resources, and search committees to achieve an exceptional outcome.
- Thoroughness in establishing appropriate selection criteria through discussions with client stakeholders.
- The development of a robust search strategy to produce a deep and inclusive selection pool.
- The effective assessment of the skills and talents that will ensure an excellent candidate.

The following demonstrates our overall strategic approach to supporting organizations in finding great matches.



We are proud members of the Association of Executive Search and Leadership Consultants (AESC), a global organization headquartered in New York, USA, that sets the highest standards for executive search practices. AESC is comprised of executive search and leadership advisory firms and networks representing 16,000+ trusted professionals in 70+ countries. We are committed to adhering to AESC's global executive search best practices standards through our membership.

Testimonial from a Canadian University

"If your firm or institution is conducting an Executive search, consider Royer Thompson. They aggressively search across the country, delving into multiple levels to find candidates with the appropriate qualifications and outlook. Their research is impeccable, and the degrees of applicant assessment are unrivalled. After the first search, we trusted Royer Thompson to analyze the leadership capacities of candidates to the greatest degree possible. We all became well-versed in understanding each candidate's strengths in each search and aware of the areas in which candidates would require assistance and support. We were very confident in Royer Thompson finding us the right people."

Demonstrated Success (Similar Academic Placements)

The following is a sample of recent academic and executive search experience within the post-secondary education sector.

Institution	Leadership Role	Search Lead
Mount Allison University (2024)	President & Vice-Chancellor	Kim West
Mount Allison University (2023)	Interim President & Vice-Chancellor	Kim West
Mount Allison University (2024)	Provost and Vice President, Academic and Research (Active)	Kim West
StFX University (2024)	Associate Dean, Rankin School of Nursing	Kim West
Dalhousie University (2023)	Vice-President People & Culture	Amy Reid
StFX University (2023)	Dean of Arts	Kim West
Saint Mary's University (2022)	Associate Vice-President People & Culture	Amy Reid
StFX University (2022)	Director of Human Resources	Amy Reid
StFX University (2022)	Vice President Finance & Administration	Kim West
StFX University (2022)	Vice President Advancement	Kim West
StFX University (2022)	Dean of Science	Amy Reid
StFX University (2021)	Dean of Education	Kim West
Mount Allison University (2021)	Vice President Advancement	Amy Reid
Dalhousie University (2019)	Assistant Vice-President, Communications & Marketing	Amy Reid
Dalhousie University (2019)	Assistant Vice-President, Development	Amy Reid
Saint Mary's University (2019)	Director, Government Relations	Amy Reid
Dalhousie University (2018)	Executive Director, Advancement Operations	Kim West
Dalhousie University (2018)	Director, Counselling Services	Kim West
Saint Mary's University (2018)	Director, Institutional Data Analysis & Planning	Amy Reid

Demonstrated Success (Similar Non-Academic Placements)

The following is a sample of recent executive searches within a broad range of sectors.

Immigrant Services Association of Nova Scotia - ISANS (2024)	Chief Executive Officer	Kim West
Halifax Regional Municipality (2024)	Chief of Police (Active)	Amy Reid
City of Moncton (2024)	Chief Administrative Officer	Greg Dickie
Workers Compensation Board (2024)	Chief Technical Officer	Greg Dickie
Moncton Chamber of Commerce (2024)	Chief Executive Officer	Greg Dickie
Efficiency One (2024)	Chief Operating Officer	Amy Reid
Cox and Palmer (2024)	Chief Operating Officer	Greg Dickie
Cresco (2024)	Vice President, Development & Construction	Greg Dickie
Commissionaires Nova Scotia (2024)	Chief Operating Officer	Erica Armstrong
Canadian Association of Recycling Industries (2024)	Chief Executive Officer	Greg Dickie
Nova Scotia Barristers' Society (2023)	Chief Executive Officer	Amy Reid
Black Business Initiative (2023)	Chief Executive Officer	Amy Reid
Workers' Compensation Board (2023)	Chief Executive Officer	Amy Reid
Dartmouth General Hospital Foundation (2023)	Vice President Philanthropy	Amy Reid
Canada's Ocean Supercluster (2023)	Chief Growth Officer	Kim West
Micco Companies Inc. (2023)	Vice President Finance	Kim West
Nova Scotia Health (2022)	Vice President, People, Culture & Belonging	Amy Reid
Commissionaires Nova Scotia (2022)	Chief Executive Officer	Amy Reid
Invest Nova Scotia (2022)	Chief Executive Officer	Greg Dickie
The Armour Group (2022)	Vice President, Real Estate Management	Kim West
Build Nova Scotia (2022)	Chief Executive Officer	Amy Reid
BioVectra (2022)	Vice President, IT & Digitization	Greg Dickie
Nova Scotia Health (2022)	Chief Information Officer	Greg Dickie
Cooke Inc. (2022)	Chief Legal Officer	Claire Rousseau-Sullivan
Nova Scotia Liquor Corporation (2022)	Vice President, IT	Greg Dickie

Search Team Knowledge and Expertise

The President and Vice-Chancellor search team is led by Kim West, an experienced leader with over 30 years of regional and national experience advising Boards and senior leadership teams in the post-secondary sector. Kim is accompanied by an experienced and talented team of consultants, including Amy Reid, Sarah Crown, Dominique Roche, Jenna Gromack, and Edgarson Moxey.

For search team members' CVs, please refer to Appendix A.



Kim West
President

Role: Search Lead
As Search Lead, Kim

[Redacted content]

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Amy Reid
Partner, Vice President Executive Recruitment

Role: Search Advisor

Amy has established executive networks within the academic sector and has a deep pool of candidates across Canada. She provides input into the search strategy and taps her personal networks to identify a diverse candidate pool.

Relevant experience and expertise: Amy has over 20 years of recruitment and talent acquisition industry expertise

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Amy is Partner and Vice President Executive Recruitment at Royer Thompson.

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Sarah Crown
Assessment Lead & VP, Talent/Culture Advisory

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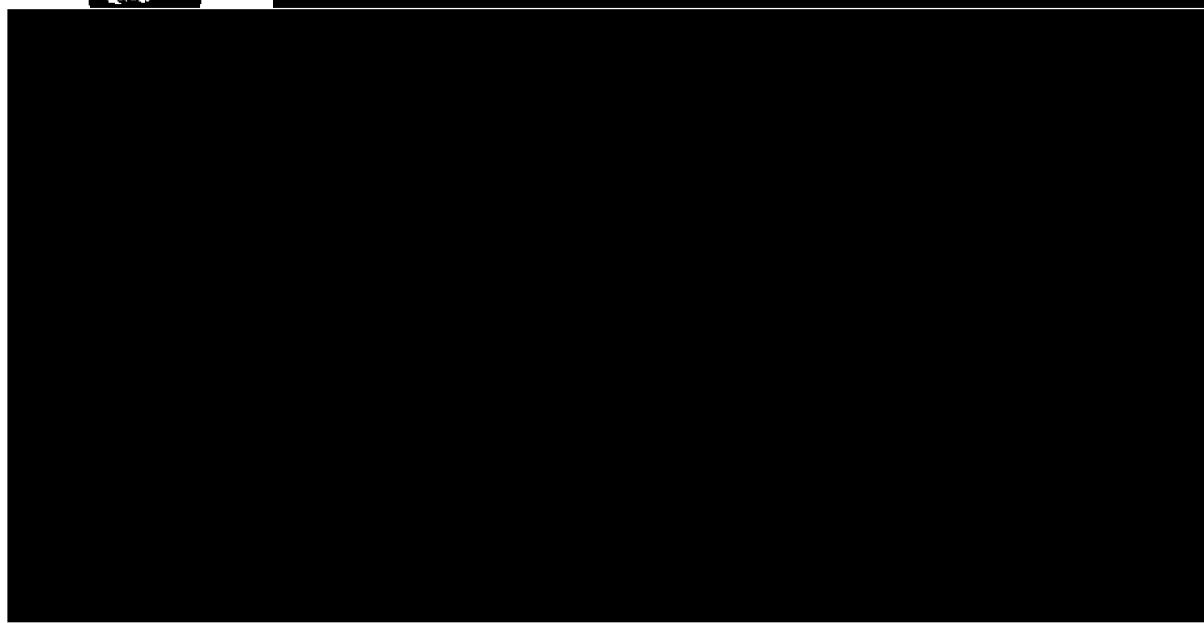
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Sarah is Vice President, Talent & Culture Advisory and Assessment Lead at Royer Thompson.

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Dr. Dominique Roche
Consultant



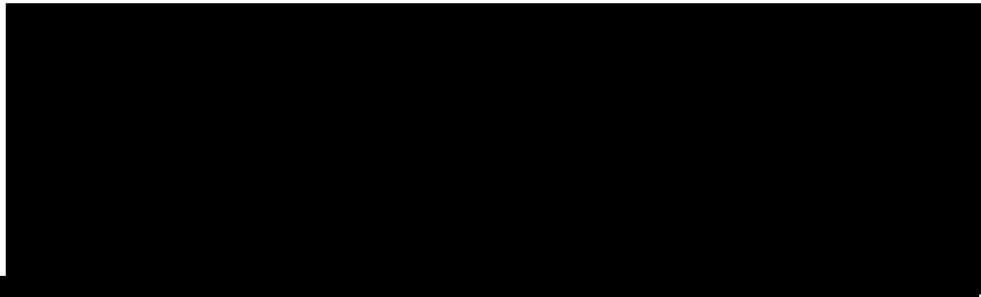
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Jenna Gromack
Associate

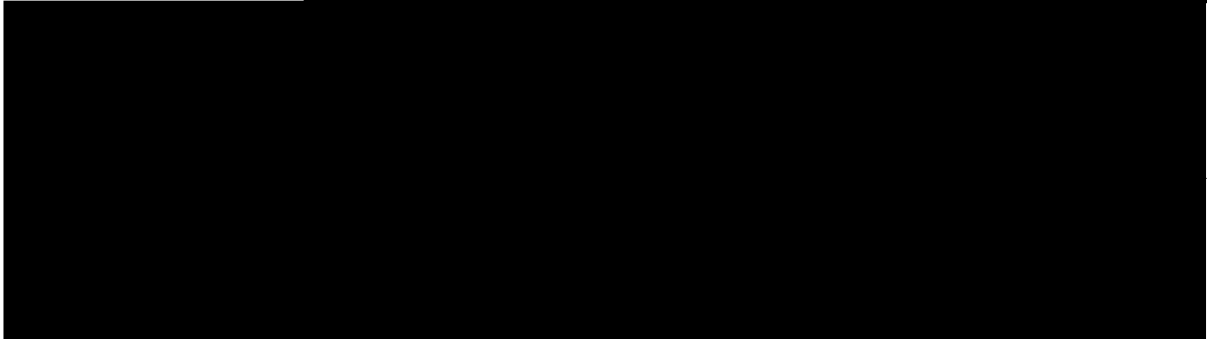
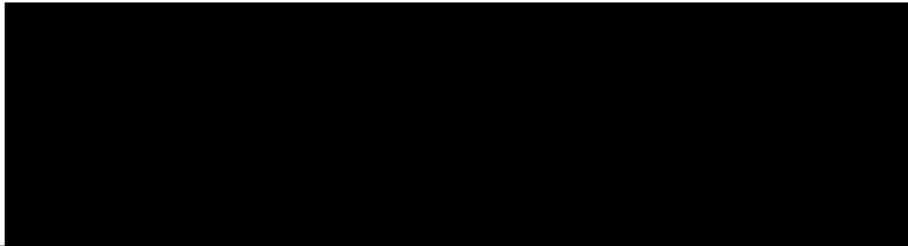


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Edgarson Moxey
Executive Recruitment Coordinator

Role: Recruitment Coordinator



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Scope of Service

Our process consistently delivers a diverse roster of exceptional leaders, one of whom will be selected as an outstanding match for the position of President and Vice-Chancellor of Memorial University.

We partner with the Search Committee with intention and see each search through to a successful conclusion. We are committed to ensuring that due diligence is complete before introducing candidates to you for an interview, and we offer an extensive guarantee that enables you to have confidence in the depth of our processes, including leadership assessments and referencing.

Candidate and Committee Privacy and Confidentiality

University administration is a small pool in Canada and elsewhere. Protecting the privacy and confidentiality of personal information is an important aspect of the way Royer Thompson conducts its business. We protect and respect the personal information of clients, candidates, employees, and business partners in accordance with all applicable regional and federal laws. search committee members are required to sign a confidentiality disclaimer upon search engagement. All Royer Thompson

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Campus Consultation

University presidential searches are an opportunity to engage with stakeholders and the broad community to seek input, align on future leadership requirements within the university, and set the context for a successful President and Vice-Chancellor.

We support the Search Committee and collaborate with External Relations on a landing page for the President and Vice-Chancellor search to promote opportunities for input and provide updates.

Dr. Roche leads all aspects of the community consultation process, which will involve all Memorial University campuses and locations.

Consultation can take a variety of forms:

- Select stakeholder interviews with individuals identified by the search committee as having key relationships with the position. Royer Thompson prepares the questionnaire to solicit input from all stakeholders regarding the qualities, competencies, and experience they believe are required. We conduct individual interviews and assess the results, defining themes that emerge. The insights are shared with the search committee and, ultimately, frame the recruitment materials, which serve as the basis for the search.
- An online survey of the broad university and alumni community on the qualities, interpersonal attributes, and experiences to engage their interest and support. Royer Thompson designs the engagement and consolidates the feedback.
- Select focus group discussions with people who are specifically and collectively interested in the search's outcome. These could include administrative, alumni, donor, student, and faculty associations.
- Royer Thompson provides support with communication materials for the website and other channels to update the community as the process progresses.
- An email can be set up for the Search Chair to receive community feedback and suggestions on candidates, which can be shared with Royer Thompson.

Dr. Roche uses a sophisticated exploratory sequential design to delve deeply into the diverse perspectives of key internal and external stakeholders. Firstly, in-depth exploratory interviews are conducted, meticulously mining for insights and delineating pertinent codes and themes. These interviews serve as the foundation upon which our subsequent methodology is built.

Leveraging the rich qualitative data gleaned from the interviews, we craft an online survey tailored to capture quantitative insights from a broader swath of the university community. This sequential approach seamlessly combines qualitative depth with quantitative breadth, ensuring a robust and multifaceted exploration of stakeholder viewpoints.

By methodically integrating qualitative narratives with quantitative data analysis, our methodology not only validates initial qualitative findings but also unearths nuanced insights impossible to discern through either method alone. This comprehensive understanding of stakeholder perspectives has become the cornerstone of our informed decision-making process regarding recruitment strategy and materials.

The Search Committee members, entrusted with steering the course of our presidential search, have welcomed this approach wholeheartedly, recognizing its capacity to provide them with concrete, data-driven insights essential for making informed decisions that align with their institution's vision and values.

Preparation of Materials

We incorporate key learnings from consultations to gain an appreciation of the requirements, accountabilities, and scope, and the major challenges facing the next President and Vice-Chancellor. We develop the Position Description, Ideal Candidate Profile to describe in detail the professional experience, technical competencies, education, personal characteristics and style, and leadership and management ability of the ideal candidate. We use this instrument to assist in assessing potential candidates and to enable the search committee to prioritize essential and desirable qualifications to support an effective decision-making process. Additionally, we prepare a Candidate Brief document, which includes a description of the university as an employer, the position description, and information on living in the local area. These materials tell a compelling story about Memorial University and why a top university administrative leader would want to lead the organization.

Advertising

Royer Thompson develops a compelling advertisement and advertisement strategy to promote the opportunity nationally and internationally in post-secondary publications and social media channels across Canada and select international publications. Options we consider include, but are not limited to, Academia Careers, LinkedIn jobs, AESC, University Affairs, and Senior Women Academic Administrators of Canada. Please see the advertising options contained in section 6. 5.

Proactive National and International Outreach

We leave no stone unturned in direct sourcing of top candidates through our extensive national and international post-secondary networks, partners, and our candidate database, Top Echelon. We have regular conversations with academic leaders across Canada to understand their aspirations and interests in taking on meaningful administrative leadership roles, particularly in Atlantic Canada.

Additionally, direct sourcing of candidates and thorough, targeted research are critical to ensure that you have access to a larger pool of qualified candidates, not just those actively seeking their next career opportunity. Quality candidates often need to be encouraged to consider taking on the challenge of a new position and often relocating.

We conduct a preliminary screening process of all applications received in response to the advertisement and our direct outreach and sourcing efforts. Subsequently, we perform 1.5-hour-long in-person or virtual in-depth behavioural and situational-based interviews with the long list of potential candidates. From this long list, we identify recommended short-list candidates to present to the search committee at the short-list meeting.

Internal Candidates/Candidate Care

It is a measure of strength for organizations to have cultivated people within an organization to consider the top role. However, their needs in the process are unique and require great care. We have extensive experience managing internal candidate care to ensure a positive outcome, whether the individual is selected for the top role or whether they continue to be engaged in the organization in a senior leadership capacity.

We manage all communication with candidates (internal and external) concerning the project's progress and the status of their application. We are committed to ensuring all applicants are treated with diplomacy and respect so that they will think well of the recruitment process and your organization regardless of the outcome.

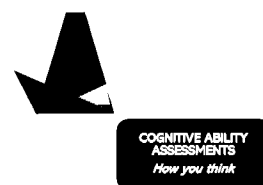
Preparation of Materials for Committee Selection

In preparation for the committee selection of short-list candidates, we provide a detailed, written summary report for each recommended candidate, incorporating the results of our in-depth Royer Thompson interviews. We also prepare a summary of long-list candidates considered in the recruitment process. Short-list meeting materials are shared in advance for the Committee's review.

Leadership Assessments

Once the Search Committee approves the shortlist of candidates, we conduct independent, objective, and thorough assessments, including further in-depth interviewing to determine our candidates' leadership ability, breadth of experience, depth of knowledge, and level of interpersonal skills and judgment. We utilize psychometric assessments for our candidates, interpreted by Sarah Crown, MSc., our Vice President of Talent and Culture Advisory and Assessment Lead at Royer Thompson.

One of our differentiators is that our assessment reporting is customized to the position. We provide a debrief on each candidate's findings before the Search Committee meeting. This process ensures transparency and respect for the candidates and allows us to seek clarification on any contradictions in the data. We will report back on the strengths and challenges of each candidate relative to the most important competencies for the role. We present a summary of the findings for each candidate and prepare a comparison document to facilitate efficient discussion.



360 Reference and Background Checks

We ensure that Senior Consultants conduct 360-degree reference checks, and we have found that past performance is the best indicator of future performance. Comprehensive and diplomatic reference checks with those in key relationships with the candidate provide an opportunity to gather additional information to corroborate details obtained through the application and interview process. Additionally, we complete education verification and criminal background checks on short-list candidates.

Interviews

We provide the Search Committee with a detailed, written assessment of candidates, incorporating the results of our in-depth interviews, referencing outcomes, and assessments. Typically, with national and international searches, Search Committees like to meet candidates for a 1st interview conducted virtually. This enables the Search Committee to meet more candidates before finalizing the roster to be invited for in-person campus visits. We work with the Search Committee to finalize the candidates and campus tour itinerary.

Campus Visits

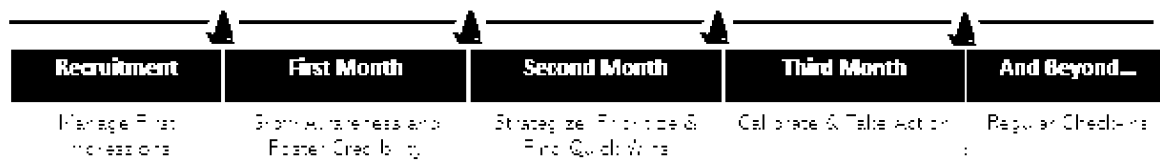
We work with the Search Committee to design a meaningful and productive itinerary for the candidate to get to know the university community and for the community to get to know the candidate. Much discussion is required with the Search Committee to determine the degree of engagement with the community – whether an open, semi-open, or closed search. We typically recommend some engagement beyond the Search Committee, even if only with select stakeholders. We recommend an intentional feedback process for those who meet the candidates to provide additional context to the Search Committee.

We organize interview logistics, including scheduling, accommodations, and travel, ensuring confidentiality for all candidates and a smooth, efficient, and highly professional process that reflects well on you. We attend all interviews to ensure that all the logistics run smoothly.

Contract Advice/Negotiation

We work with the Search Committee to prepare a recommendation to the Board of Governors. Once a decision has been approved, we help develop an offer to the preferred candidate and act as an intermediary, as appropriate, to bring an individual on board. This is a crucial stage of the recruitment process, and as an experienced third party, we can facilitate an agreement.

Onboarding & Post Placement Follow-Up

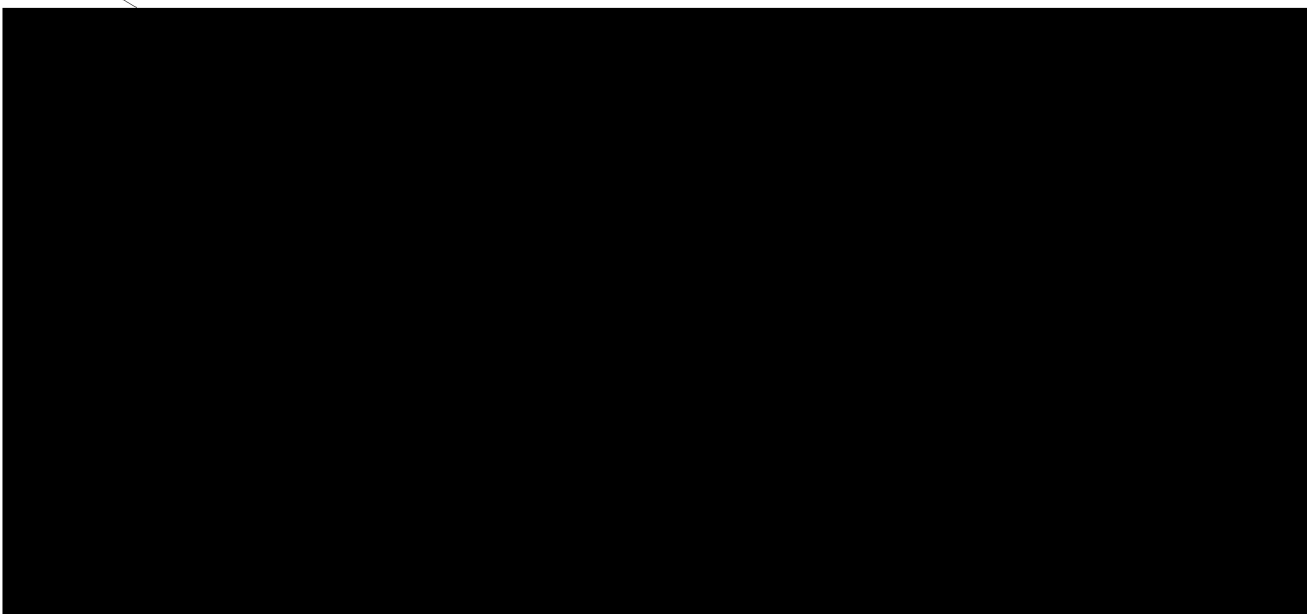


It has never been more important to support a new leader in their transition to a new organization. Without proper support, up to half of externally hired leaders fail within the first 18 months. Learning about the organization's culture, finances, business, and risks takes time, and yet the successful candidate only gets one chance to make a first impression, create excitement among employees, and build external relationships that are critical to long-term success.

An effective onboarding plan begins during recruitment and defines the critical focus areas and milestones in the first three months and beyond.

- *Leverage Assessment Insights:* We will use the leadership assessment data of the successful candidate to provide tailored recommendations for ensuring a smooth transition. We will also conduct a 1–2 hour deep dive into assessment results with the new President and Vice-Chancellor and support them in crafting an onboarding strategy that leverages our knowledge of your organization and their typical style and approach.
- *Check-ins:* We check in with Memorial University and the successful candidate throughout their first 12 months to assess onboarding progress.





National Network and Outreach Capabilities

We have well-established executive recruitment processes developed over the firm's 25-year history and refined to incorporate innovation in technology, research, and marketing. Over the last six years, we have invested in people and resources in our academic search practice. As a result of our work, we are in regular contact with potential candidates nationally and globally.

We begin all searches with comprehensive research on potential presidential candidates, a market analysis of recent searches and appointments, and a tap into our in-depth personal and firm networks.

We maintain an active database of university leadership candidates through our CRM, Top Echelon. This database is curated through proactive, targeted candidate outreach that taps into regional, national, and international networks. Our global membership with AESC offers access to recruitment allies in 70+ countries, as does our national affiliation with Verity International. Royer Thompson tracks interactions with candidates during proactive sourcing and when they become applicants. All applicants are notified upon search completion that the role is filled.

Our recruitment teams subscribe to LinkedIn Recruiter to further supplement efforts in creating and maintaining candidate contacts and pipelines. Additionally, we leverage strategic advertising in nationally and internationally recognized publications and across numerous social media channels as resources to connect and engage with candidate audiences.

Our teams are well-defined and trained to be efficient and engaging with Search Committees, stakeholders, and candidates.

Commitment to Diversity, Equity, Inclusion, and Accessibility

Royer Thompson has a demonstrated track record of proactively reaching out to and placing women and members of other equity-deserving groups in leadership opportunities. In the past 12 months, 100% of our academic search long-lists and short-lists have included candidates from equity-deserving groups. Approximately 95% of our total searches in the last 12 months (all sectors combined) have resulted in diverse candidate long-lists and short-lists.

Our EDIA commitment is based on our organizational values – Care, Curiosity, Courage, and Excellence. We also follow the AESC code of professional practice framed on the following principles: [AESC Standards of Excellence | AESC](#). We channel our EDIA efforts at every stage and from every angle during our executive search process, recognize the value of diverse perspectives, and leverage the full potential of those differences.

Our team has significant experience and understanding of employment equity, diversity, inclusion, and accessibility, as well as a strong network of diverse communities. We are committed to presenting a diverse roster of candidates to our clients by

proactively sourcing equity-deserving candidates and inviting them to self-identify when submitting their applications. We also provide accommodations to applicants with disabilities to support their participation in the recruitment process.

Other specific actions to support EDIA within Memorial University's search:

- We engage our experts, including Dr. Dominique Roche, who is Certified in Diversity, Equity, and Inclusion. She will provide unconscious bias training for the Search Committee.
- We seek to understand the university's diversity goals.
- We encourage a diverse composition of the Search Committee and Search Team members so that we can count on a balanced representation of individuals to mitigate potential conscious and unconscious bias throughout our process.
- We have a diversified job advertisement strategy to reach current and historically underrepresented communities through community newsletters and targeted platforms, meeting candidates where they are.
- We share leadership opportunities with our network of contacts who work with equity-deserving groups.
- Our job advertisements include a diversity pledge encouraging applications from Indigenous persons, racially visible persons, persons with a disability, women, and persons of a minority sexual orientation and/or gender identity, and we invite candidates to self-identify in their cover letter or resume and provide accommodation(s) throughout the process.
- We deploy fair interview assessments of each candidate using a multi-factor assessment approach designed to reduce bias.
- We perform structured, in-depth Royer Thompson interviews that are rigorous, professional, and tailored to avoid unconscious bias. Two Search Consultants participate to counterbalance perspectives and opinions about each candidate's performance.
- We only use global research-based assessment tools tested in different groups and settings, including individuals from different socio-demographic backgrounds worldwide. Our assessment approach is based primarily on the candidates' personalities and cognitive abilities.
- We advise on the leader's successful transition and belonging in their workplace culture.
- We are members of the Association of Executive Search and Leadership Consultants, a global organization that shares best practices for equity, diversity, and inclusion. These practices are evolving, and we regularly update our approaches.

When candidates from equity-deserving groups are recruited into an organization, we ensure the onboarding process supports the candidate and the organization in identifying potential areas for support and development. This can include training and development for colleagues to mitigate risks of unconscious bias and promote an inclusive culture and cross-cultural understanding.

Commitment to Time Frame

Our firm resources will be fully committed to supporting delivery within the desired timeframe. Based on our track record of past academic searches, this timeline is aligned.

We are very comfortable and knowledgeable about recruitment processes that align with the academic calendar. For this search, we would align with the Search Committee to ensure your new President and Vice-Chancellor is in place for the 2025 academic year. As a starting point for discussion, we propose the following timeline for the President and Vice-Chancellor search. Upon engagement, we consult with the Search Committee to identify search milestone dates and confirm the timeline. Weekly and bi-weekly communications allow an opportunity to share any challenges or deviations from the timeline.

DATE	PHASE	ACTIVITIES
July/August 2024	Strategy & Planning	<ul style="list-style-type: none"> Search Committee Chair Briefing Search Committee Kick-off Meeting
August-October 2024	Community Consultation	<ul style="list-style-type: none"> Design of consultation process, including design of surveys and virtual and on-campus pop-ups and channels for input Campus consultation implementation Debrief on Campus Consultation results
October 2024	Recruitment Materials	<ul style="list-style-type: none"> Position description/ideal candidate profile Advertisement & advertising strategy Candidate briefing package
October-December 2024	Sourcing & Recruitment	<ul style="list-style-type: none"> Advertising go-live Candidate research & identification National and international outreach to potential candidates Candidate prescreening and RT interviews Identification of long-list
January/February 2025	Evaluation & Assessment – 1st round virtual interviews	<ul style="list-style-type: none"> Unconscious bias training for Search Committee Search Committee collaboration on long and short-lists Confirmation of candidates for 1st round virtual interviews Design interview guide Collaboration with the Search Committee on candidates for campus visits (Typically 2-4 candidates)
March/April 2025	Campus Visits – Presentation, Committee Interviews & Selection	<ul style="list-style-type: none"> Design campus visit itinerary Interview strategy/interview guide/logistics Candidate preparation Leadership assessments, 360 references, and background checks on short-list candidates Committee debriefing on leadership assessments Committee interviews & campus tour Candidate selection, offer, and negotiations Communication to unsuccessful candidates
May 2025	Onboarding Strategy	<ul style="list-style-type: none"> Transition planning Onboarding strategy development

Cost and Fee Structure

Below is the guaranteed fixed fee for Royer Thompson's engagement and outlined estimated expenses.

Community/Campus Consultation (fixed project cost) \$30,000 + HST

Management/Consulting Fee – Community/Campus Consultation
<p>Royer Thompson's professional fixed consultation fee is \$30,000 (plus HST). Our stakeholder consultation approach is comprehensive, including an exploratory sequential design, which is further explored in the Scope of Service section, Campus Consultation. In short, through a mixed-method approach tailored by Dr. Roche, the university will benefit from an evidence-based process that will assist the Search Committee in making data-driven decisions about the recruitment strategy and materials.</p> <p>The recruitment fee covers:</p> <ul style="list-style-type: none"> • Deployment of community consultation on all campuses and locations • Individual stakeholder structured interviews (up to 30 individuals) • Virtual and in-person pop-ups on campus • Online survey design for all the university community • Assistance with communications strategy • Data collection and analysis • Reporting of findings

Recruitment and Onboarding (fixed project cost) \$75,000 + HST

Management/Consulting Fee – Recruitment and Onboarding
<p>Royer Thompson's professional fixed recruitment fee is \$75,000 (plus HST).</p> <p>The recruitment fee covers:</p> <ul style="list-style-type: none"> • Search Committee orientation/onboarding • Unconscious bias training with the Search Committee • Compensation advice • Position description/ideal candidate profile • Advertisement & advertising strategy • Candidate briefing package • Candidate research & identification • Broad market search & outreach to candidates • Candidate prescreening and RT interviews • Identification of long-list • Collaboration with the Search Committee on the shortlist • Interview strategy/interview guide/logistics for 1st round virtual interviews (typically 6-8 candidates) • Candidate preparation • 360-references (4 per short-listed candidate) • Campus tour itinerary (Typically 2-4 candidates) • Support on presentation topic and interview questions • Support on candidate selection, offer and negotiations • Communication with unsuccessful candidates • Transition planning • Onboarding strategy development • Regular follow-up with the President & Vice-Chancellor and Board Chair

Estimated Additional Recruitment Expenses (variable costs):

<p>Estimated Variable Expenses</p>
<p>Leadership Assessment Fee Assessments completed on short-listed candidates cost \$1,500 per candidate (plus HST). Generally, short-lists include 3 to 4 candidates.</p>
<p>Candidate Travel & Accommodation Expenses Candidate travel/accommodation expenses will depend on the short-listed candidates' originating location. Estimated travel expenses for out-of-region candidates are generally \$1,500 (plus HST) per candidate.</p>
<p>Consultant Travel & Accommodation Expenses Consultant travel from Halifax to St. John's and Corner Brook, estimated at four trips for search lead and campus consultation lead.</p>
<p>Advertising Expenses Advertising expenses depend on the options the Committee approves. We work with you to identify an appropriate advertising strategy. Possible advertising considerations are estimated at \$4,500 (plus HST).</p>
<p>Education and Background Check Expenses Covers education verification and criminal record background checks on short-listed candidates at \$100 per candidate (plus HST).</p>

<p>Optional Services for Consideration</p>
<p>Ignite Onboarding Coaching We are also pleased to offer IGNITE, our executive coaching program specifically designed to support a newly engaged senior executive through a successful transition. A detailed description of the program is included in the Scope of Service section.</p> <p>The investment for this optional service could range between \$10,000 and \$15,000. Exact pricing is dependent on the length of the coaching engagement and is customized to the client's needs.</p>

Invoicing & Payment Terms

It is our practice to invoice the recruitment fee and associated expenses in three installments.

The first recruitment fee installment is issued upon search engagement. The second recruitment fee installment, as well as advertising expenses, is issued after the short-list of candidates has been approved by the Search Committee. The final recruitment fee installment, as well as leadership assessment, background check, and consultant and candidate travel/accommodation expenses (if incurred), is issued upon the successful hire of the new leader.

All prices are quoted in Canadian dollars and must be paid in Canadian dollars. Invoice payments are due 30 days after receipt.

Guarantee Terms

Should a placed leader leave your organization due to resignation or termination within 12 months of service, Royer Thompson will resume the search at no additional cost other than any new, approved, out-of-pocket expenses. However, if the leader's departure within this timeframe is a result of organizational restructuring,

downsizing, or a significant shift in role definition, mandate, or organizational direction, the full recruitment fees will apply to facilitate the placement of a new leader.

In the rare event that a search does not uncover a successful candidate, Royer Thompson commits to working closely with the search committee to re-strategize and continue search efforts accordingly at no added costs other than any outstanding recruitment fee payments based on outstanding recruitment phase milestones met, as well as any new out-of-pocket expenses required and approved by the search committee.

Value-add Options

We are including the delivery of unconscious bias training to the Search Committee members in the management/consulting fee. Other firms regularly charge for this as an additional service.

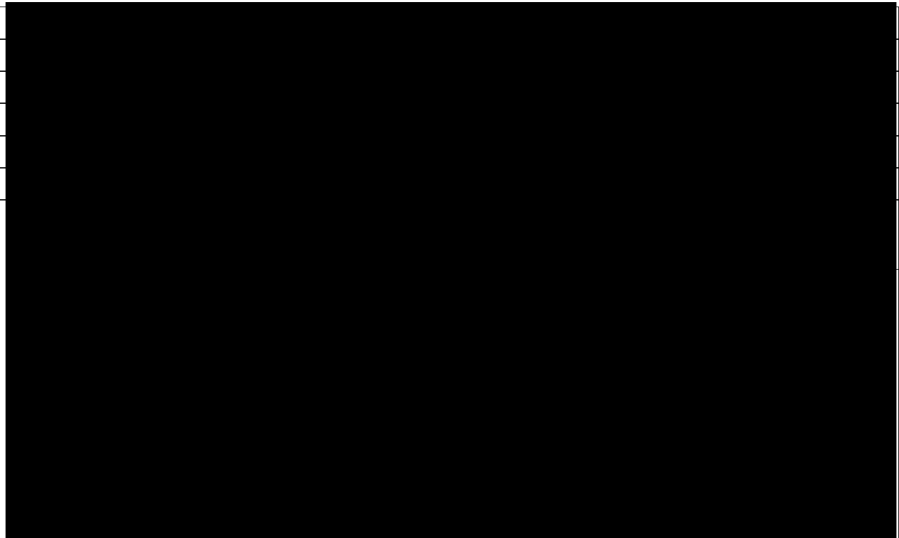
Conflict of Interest Disclosure

We are not currently engaged in other Presidential university searches and do not have any other conflict of interest to disclose. If selected, Memorial University would be our priority for the balance of 2024 and early 2025.

References

Reference #1

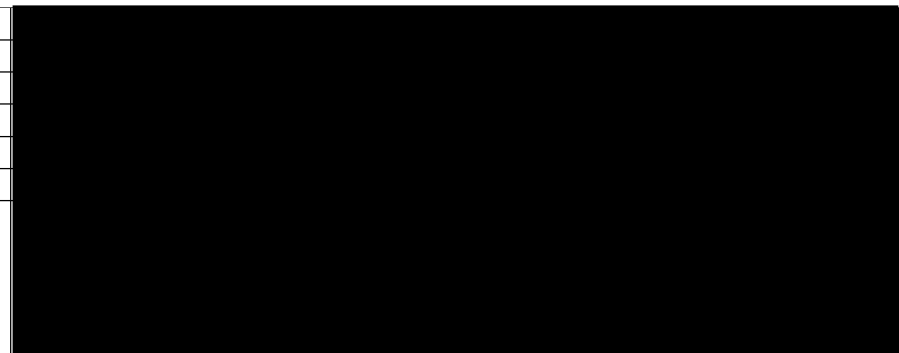
Company Name:
Company Address:
Contact Name:
Contact Email:
Contact Phone Number:
Date of Search (s):
Nature of Assignment:



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Reference #2

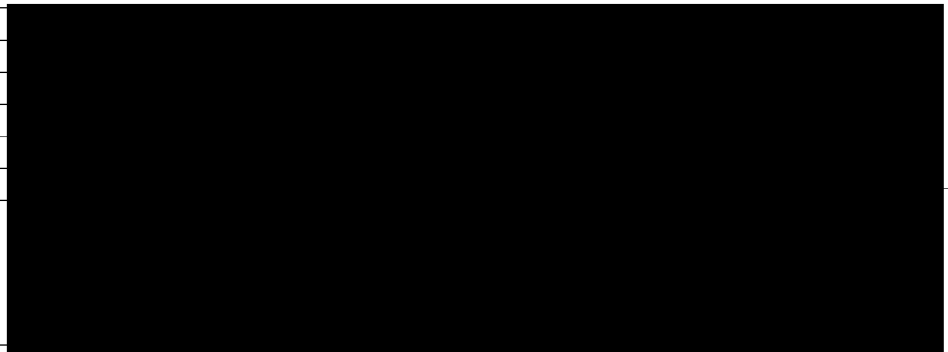
Company Name:
Company Address:
Contact Name:
Contact Email:
Contact Phone Number:
Date of Search (s):
Nature of Assignment:



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Reference #3

Company Name:
Company Address:
Contact Name:
Contact Email:
Contact Phone Number:
Date of Search:
Nature of Assignment:



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Risk Mitigation

We place a high premium on strategies that mitigate risk for organizations in leadership transitions.

Widely cited research indicates that nearly half of new senior leaders do not make it past 18 months, and the costs of replacing them are staggering. The cost can include compensation packages, duplicated recruiting investments for the replacement, lost momentum, loss of confidence and instability with internal and external stakeholders, and diminished employee morale and confidence in the Board of Directors. Risks can be mitigated by working with the right executive search firm. AESC membership is highly selective, with a rigorous process using global due diligence standards.

AESC Members commit to AESC's Code of Professional Practice (aesc.org/profession/professional-code) the key elements of which include:

- ✓ **Integrity:** AESC Members conduct themselves and their business activities with absolute integrity and are at all times open, honest, and worthy of trust.
- ✓ **Excellence:** AESC Members focus on their clients' unique business needs, provide high-quality service, and use rigorous results-focused methodologies.
- ✓ **Objectivity:** AESC Members serve as trusted advisors, exercising independent, objective judgment.
- ✓ **Diversity & Inclusion:** AESC members value diverse leadership. They identify the most qualified talent by searching and assessing without bias.
- ✓ **Confidentiality:** AESC Members always respect any confidential information entrusted to them by clients and candidates.
- ✓ **Avoiding Conflict of Interest:** AESC Members avoid conflicts of interest with clients and candidates. Where a potential conflict may exist, members disclose and resolve those conflicts.

Risk Identification	Royer Thompson Risk Management Strategies
Real or perceived Conflict of Interest	Before commencing any executive search, Royer Thompson undertakes an assessment of real or perceived conflicts of interest, including, but not limited to, the firm's other work with the organization, relationships between the search firm and the organization, and relationships between potential internal candidates.
Misalignment among the Search Committee Members	Royer Thompson conducts extensive consultation with key stakeholders at the beginning of a search; this information is reflected in the search strategy and recruitment materials and signed off by the Committee Chair. Royer Thompson provides Terms of Reference for the Committee and reviews the Terms of Reference with the committee at the kick-off meeting. It is important to understand the search criteria, candidate profile, and subsequent finalization of the search strategy. During this phase, Royer Thompson will identify and anticipate any potential considerations or issues in attracting candidates and proactively communicate and address them with the committee.
Quality and timing of references	Royer Thompson conducts 360-degree reference checks on all short-listed candidates, not just the final candidate. References are checked by partners in the firm, not junior or intermediate consultants. Reference information is available to Committees in advance of the first Committee Interview so that they can probe areas of potential concern.
Quality and timing of leadership assessments	Royer Thompson conducts leadership assessments on all short-listed candidates, not just the final candidate. Our Assessment Lead conducts these assessments and debriefs the Committee on the results before they interview the short-listed candidates. This helps frame questions and discussions between the Committee and candidates and allows Committees to compare and contrast candidates' skills and leadership styles.
False claims on credentials or non-disclosure of information by candidates	Royer Thompson conducts background checks on final candidates, including criminal, educational and social media verification checks. Short-listed candidates must sign an authorization permitting the verification.
Internal candidates are not successful.	Royer Thompson ensures internal candidates are treated fairly and respectfully during each recruitment phase. We have experience advising search committees on how best to communicate search outcomes and ensure internal candidates feel valued and are part of the future. At the same time, there are times when an unsuccessful candidate may choose to pursue other opportunities. We advise organizations on such transitions.
Top candidate withdrawal from the process or declined the offer	The rigour of our pre-screening, interviewing and candidate evaluation processes minimizes the risk of a permanently declined offer. Our approach is to pre-close the preferred candidate prior to the official offer stage to mitigate gaps and challenges as early in the process.

Appendix B – Submission Form

1. Proponent's Information

Please fill out the following form, naming one person to be the Proponent's contact for the Open Call process and for any clarifications or communication that might be necessary.	
Full Legal Name of Proponent:	Royer Thompson
Any Other Relevant Name under which Proponent Carries on Business:	N/A
Street Address:	1718 Argyle Street Suite 500
City, Province/State:	Halifax, Nova Scotia
Postal Code:	B3J 3N6
Phone Number:	902-422-2099
Fax Number:	N/A
Company Website (if any):	www.royerthompson.com
Proponent's Contact Name and Title:	Kim West
Proponent's Contact Phone:	902-422-2099
Proponent's Contact Fax:	N/A
Proponent's Contact Email:	kwest@royerthompson.com

2. Offer

The Proponent has carefully examined the Open Call documents and has a clear and comprehensive knowledge of the Deliverables required under the Open Call. By submitting a Proposal, the Proponent agrees and consents to the terms, conditions and provisions of the Open Call, including the Form of Agreement, and offers to provide the Deliverables in accordance therewith at the rates set out in the pricing section.

3. Rates

The Proponent has submitted its rates in accordance with the instructions in the Open Call. The Proponent confirms that it has factored all of the provisions of Appendix A, including insurance and indemnity requirements, into its pricing assumptions and calculations.

4. Addenda

The bidder is deemed to have read and accepted all addenda issued by the Owner. The onus is on bidders to make any necessary amendments to their bids based on the addenda. The bidder is required to confirm that it has received all addenda by listing the addenda numbers on the following line: **N/A** . Bidders who fail to complete this section will be deemed to have not received all posted addenda and shall be deemed **non-compliant**.

5. No Prohibited Conduct

The Proponent declares that it has not engaged in any conduct prohibited by this Open Call.

6. Disclosure of Information

The Proponent hereby agrees that any information provided in this Proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The Proponent hereby consents to the disclosure, on a confidential basis, of this Proposal by the Owner to the advisers retained by the Owner to advise or assist with the Open Call process, including with respect to the evaluation of this Proposal.

7. Proposal Irrevocable

The Proponent agrees that its proposal shall be irrevocable for a period of **90** days following the Submission Deadline.

8. Required Signatures

Failure to submit this signature section will render the Proposal NON-COMPLIANT and the Proposal will be disqualified.

 s. 40 (1)

Kim West
Name of Proponent's Representative

President
Title of Proponent's Representative

May 15, 2024
Date

I have the authority to bind the Proponent.

IN SIGNING THIS PAGE AND SUBMITTING YOUR PROPOSAL, THE PROPONENT ACKNOWLEDGES HAVING READ AND UNDERSTOOD AND AGREED TO THE TERMS AND CONDITIONS OF THIS DOCUMENT

APPENDIX B – SUBMISSION FORM

1. Proponent's Information

Please fill out the following form, naming one person to be the Proponent's contact for the Open Call process and for any clarifications or communication that might be necessary.	
Full Legal Name of Proponent:	Davies Park Edmonton LP o/a Leaders International Executive Search
Any Other Relevant Name under which Proponent Carries on Business:	
Street Address:	501, 10226 - 104 Street
City, Province/State:	Edmonton, AB
Postal Code:	T5J 1B8
Phone Number:	780-420-9900
Fax Number:	
Company Website (if any):	www.leadersinternational.com
Proponent's Contact Name and Title:	Ardyce Kouri, Partner
Proponent's Contact Phone:	780-420-9900
Proponent's Contact Fax:	
Proponent's Contact Email:	ArdyceK@leadersinternational.com

2. Offer

The Proponent has carefully examined the Open Call documents and has a clear and comprehensive knowledge of the Deliverables required under the Open Call. By submitting a Proposal, the Proponent agrees and consents to the terms, conditions and provisions of the Open Call, including the Form of Agreement, and offers to provide the Deliverables in accordance therewith at the rates set out in the pricing section.

3. Rates

The Proponent has submitted its rates in accordance with the instructions in the Open Call. The Proponent confirms that it has factored all of the provisions of Appendix A, including insurance and indemnity requirements, into its pricing assumptions and calculations.

4. Addenda

The bidder is deemed to have read and accepted all addenda issued by the Owner. The onus is on bidders to make any necessary amendments to their bids based on the addenda. The bidder is required to confirm that it has received all addenda by listing the addenda numbers on the following line: **(For example, if Addendum 1 has been issued, enter 1 on the line. If there are two addenda, enter 1, 2.)** 0 . Bidders who fail to complete this section will be deemed to have not received all posted addenda and shall be deemed **non-compliant**.

5. No Prohibited Conduct

The Proponent declares that it has not engaged in any conduct prohibited by this Open Call.

6. Disclosure of Information

The Proponent hereby agrees that any information provided in this Proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The Proponent hereby consents to the disclosure, on a confidential basis, of this Proposal by the Owner to the advisers retained by the Owner to advise or assist with the Open Call process, including with respect to the evaluation of this Proposal.

7. Proposal Irrevocable

The Proponent agrees that its proposal shall be irrevocable for a period of **90** days following the Submission Deadline.

8. Required Signatures

Failure to submit this signature section will render the Proposal NON-COMPLIANT and the Proposal will be disqualified.

Ardyce Kouri

Name of Proponent's Representative

Partner

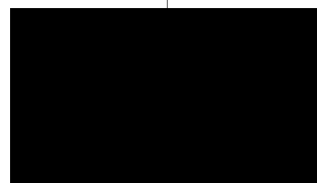
Title of Proponent's Representative

May 16, 2024

Date

I have the authority to bind the Proponent.

s. 40 (1)



IN SIGNING THIS PAGE AND SUBMITTING YOUR PROPOSAL, THE PROPONENT ACKNOWLEDGES HAVING READ AND UNDERSTOOD AND AGREED TO THE TERMS AND CONDITIONS OF THIS DOCUMENT.

May 16, 2024

STRICTLY PRIVATE & CONFIDENTIAL

Strategic Procurement Office
Financial and Administrative Services
Memorial University of Newfoundland
St. John's, NL
A1C 5S7

Re: RFP-015-24 SERVICES OF A SEARCH CONSULTANT FOR A NEW PRESIDENT AND VICE-CHANCELLOR

On behalf of Leaders International ("Leaders"), we are pleased to present our credentials for your consideration for assistance in the recruitment of a President and Vice-Chancellor with Memorial University.

Our proposal provides further details on our experience in the post-secondary sector across Canada.

Ardyce Kouri would act as the Project Lead for the search. She has been working in executive search for over 20 years and has been a Partner for over 10 years.

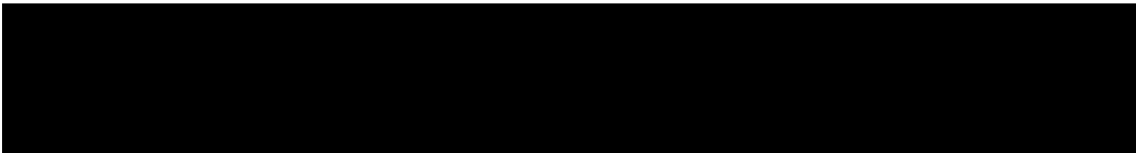
Given our extensive network and experience and our knowledge of these types of recruitments, we believe we are well positioned to support Memorial University in their efforts to identify a successful candidate for this position.

Should there be any questions or if you require further clarification/information, please call us at 780-420-9900.

We look forward to hearing from you regarding this important engagement.

Sincerely,

Davies Park Edmonton LP
o/a Leaders International



s. 40 (1)

Ardyce Kouri | Partner

Anurag Shourie | Partner

Sonny Kapoor | Partner

RFP-015-24

**Executive Search Firm Services
Recruitment of a President & Vice-Chancellor**



May 16, 2024

**Leaders International Executive Search
Suite 501, 10226 104 Street
Edmonton, AB T5J 1B8**

**Ardyce Kouri, Partner
ArdyceK@leadersinternational.com
(780) 420-9900**

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CORPORATE QUALIFICATIONS & EXPERIENCE

Leaders International Executive Search transforms organizations and the leaders who work for them. We are executive recruiters who innovate and deliver excellence. As such, we have developed a reputation for delivering superior results and impact. Leaders International is well positioned to provide Memorial University (MU) with comprehensive executive search services by leveraging our extensive contacts across Canada, our initiative-taking methodology, and our unparalleled assessment process.

Leaders International is 100% Canadian-owned, with ownership consisting of a group of Partners, all of whom are actively involved in the daily operations of the business. As one of Canada's most experienced executive search firms, Leaders International has successfully completed thousands of assignments for local, national, and international clients. Assignments include searches for senior executives and organizational leaders across a broad range of industries and sectors. In 2017, Davies Park and Leaders International (Montreal, Ottawa, Winnipeg, Toronto) merged operations. The merged group has offices in Vancouver, Edmonton, Calgary, Saskatoon, Toronto, Montreal, Ottawa, and Winnipeg.

In addition, Leaders International has partnered with Rowe Global in the US, which has expanded our North American and international reach.

Leaders International has built a reputation as a true and trusted partner for executive recruitment and we are leaders in our field. We leverage our skills, networks, and expert knowledge across a broad range of industries to connect our clients with the right talent through a seamless and proactive search process.

Our research process is designed to deliver exactly the talent needed and as quickly as possible. Leaders International closely monitors the progress of every search and values a transparent process. As our client, you can expect personal attention during every phase of the research process with a single direct point of contact from start to finish. We will seek to thoroughly understand not just the position you want to fill, but also your industry, your business, and your corporate culture, ensuring an effective platform for core concerns and input to be heard, assessed, and used to impact the direction of the proprietary research process to follow in a way that builds trust, accountability, and productive relationships.

RELATED EXPERIENCE

Demonstrated Ability To Provide Services

The following is a sample of relevant post-secondary search assignments. Although not all-inclusive of our post-secondary work, the following shows the diverse nature of our practice. All searches are FULL-CYCLE search assignments following the methodology described in this response.

Sample Post-Secondary Searches: President

Client	Position
Camosun College	President
Coast Mountain College	President
College of New Caledonia	President
College of the Rockies	President
Concordia University of Edmonton	President
First Nations University of Canada	President
Grande Prairie Regional College	President
Keyano College	President
Lakehead University	President & Vice Chancellor
Langara College	President & CEO
LaSalle College Vancouver	President
Manitoba Institute of Trades & Technology	President
Medicine Hat College	President
North Island College	President
Northern Lakes College	President & CEO
Northwestern Polytechnic	President
Okanagan College	President
Red Deer Polytechnic	President
Selkirk College	President
Vancouver Island University	President
York University Development Corporation	President & CEO

Sample Post-Secondary Searches: VP, AVP

Client	Position
College of New Caledonia	AVP, Academic
Columbia College	VP Academic
Keyano College	Vice President, Corporate Services & CFO
Lakehead University	Associate Vice-President, Communications and Marketing
Lakeland College	Vice President, Academic & Research

Client	Position
MacEwan University	AVP, Infrastructure Planning and Management
MacEwan University	VP, Finance and Administration
MacEwan University	Vice President, University Relations
Manitoba Institute of Trades and Technology	Vice President, Finance & Campus Services
McGill University	Associate Provost, Indigenous Initiatives
Mount Royal University	AVP, Facilities Management
Mount Royal University	AVP, Human Resources
NorQuest College	VP, Corporate Services & Finance
Northern Lakes College	Vice President, Academic
Northern Lights College	AVP, Educational Services
Northern Lights College	Vice President, Academic & Research
Northlands College	Vice President, Finance and Administration
Northwestern Polytechnic	Chief of Staff
Northwestern Polytechnic	Provost & Vice-President, Academic
Northwestern Polytechnic	Vice-President, Administration
Red Deer Polytechnic	Vice President, External
Royal Roads University	AVP, Communications and Marketing
Royal Roads University	AVP, Human Resources
Royal Roads University	VP, Finance & Operations
Saskatchewan Polytechnic	AVP, Campus Planning, Design and Construction
Saskatchewan Polytechnic	AVP, Information Technology Services
Saskatchewan Polytechnic	AVP, Marketing and Communications
Saskatchewan Polytechnic	AVP, Strategy
Saskatchewan Polytechnic	AVP, Student Services
Saskatchewan Polytechnic	VP, Advancement and International
Selkirk College	VP, Education
Thompson Rivers University	Associate Dean of Business and Economics - Flexible Delivery
Thompson Rivers University	Associate Dean of Business and Economics - Undergraduate
Thompson Rivers University	Associate Dean of Education & Social Work

Client	Position
University of Alberta	AVP, Marketing
University of Alberta	AVP, Shared Services
University of British Columbia	AVP, Finance & Operational Excellence
University of Calgary	AVP, Alumni Engagement & Partnerships
University of Manitoba	Vice Provost, Indigenous Engagement
University of Saskatchewan	Associate Vice President People and Chief Human Resources Officer
University of Saskatchewan	Associate Vice President Information and Communications Technology & CIO
University of Saskatchewan	Chief Financial Officer
University of the Fraser Valley	VP, External
University of the Fraser Valley	VP, Students and Enrolment Management
University of the Fraser Valley	Associate Vice President, Campus, Planning & Facilities Management
University of the Fraser Valley	Associate Vice President, Human Resources
University of Victoria	AVP, University Communications and Marketing
University of Winnipeg	Associate Vice-President, Indigenous Redo 2024
York University	Assistant Vice President Finance & CFO
York University	Assistant Vice-President, Budgets & Asset Management
York University	Canada Research Chair (Tier 1)
Yukon University	Registrar and AVP, Student Life

Sample Post-Secondary Searches: Dean, Director

Client	Position
Adler University	Director, Clinical Training
Banff Centre for Arts and Creativity	Director, Indigenous and Diversity Engagement
Banff Centre for Arts and Creativity	Director, Visual Arts Residencies
Camosun College	Executive Director, Human Resources
Capilano University	Dean, Faculty of Arts and Sciences
Centennial College	Dean, Learning, Teaching & Scholarship
College of New Caledonia	Dean, Health Sciences

Client	Position
College of the Rockies	Executive Director, Human Resources
Concordia University of Edmonton	Dean of Education
Concordia University of Edmonton	Dean of Science
Dalhousie University	Dean, Schulich School of Law
Dalhousie University	Dean of Libraries
Dalhousie University	Dean, Faculty of Science
Emily Carr University of Art and Design	Executive Director, Indigenous Initiatives
First Nations University of Canada	Director of Finance
Keyano College	Director, Research, Learning & Innovation
Kwantlen Polytechnic University	Dean, Faculty of Science & Horticulture
Lakeland College	Director of Facilities
Langara College	Dean, Faculty of Social Sciences and Community Programs
Langara College	Dean, Faculty of Science
MacEwan University	Associate Registrar, Records and Registration
MacEwan University	Director, Human Rights, Equity and Inclusion (active)
Memorial University of Newfoundland	Dean of Libraries
Memorial University of Newfoundland	Dean of Social Work
Mount Royal University	Director, Budget and Resource Planning
Mount Royal University	Director, Strategic Initiatives
NorQuest College	Director, Business Enterprises
Northern Lights College	Dean, Continuing Education
SAIT Polytechnic	Dean, Health & Public Safety
SAIT Polytechnic	Director, Learner Services
SAIT Polytechnic	Director, Indigenous Engagement
SAIT Polytechnic	Associate Dean, School of Information & Communications Technologies
Saskatchewan Polytechnic	Director, Student Engagement & Learning Services
Saskatchewan Polytechnic	Director, Enrolment Services & Registrar
Saskatchewan Polytechnic	Dean, School of Nursing & School of Health Sciences

Client	Position
Selkirk College	Executive Director, HR and Organizational Development
Simon Fraser University	Director, Career and Professional Programs
Simon Fraser University	Director, Campus Planning and Development
Southeast College	Director of Strategic Development & Corporate Training
Thompson Rivers University	Dean, Faculty of Adventure, Culinary Arts and Tourism
Trent University	Dean of Nursing
University of Alberta	Assistant Registrar and Director of Admissions
University of Alberta	Assistant Registrar, Enrolment Research, Analytics and Insights
University of Alberta	Director, Infrastructure Development
University of Alberta	Director, Periodontology Graduate Program, Department of Dentistry
University of Alberta	Executive Director, Student Experience
University of British Columbia	Director Capital Finance
University of Calgary	Director, Talent Management
University of Calgary	Director, Total Rewards
University of Calgary	Director of Development, Annual Giving
University of Calgary	Director, Internal Audit
University of Manitoba	Dean of Environment, Earth and Resources
University of Regina	Dean, Faculty of Education
University of Regina	Dean, Media, Art and Performance
University of Saskatchewan	Dean, College of Education
University of Saskatchewan	Vice Dean, Indigenous – College of Arts and Science
University of the Fraser Valley	Dean of Professional Studies
University of the Fraser Valley	Dean, Faculty of Health Sciences
University of the Fraser Valley	Dean, Faculty of Applied and Technical Studies
University of the Fraser Valley	Director, Capital Projects
University of the Fraser Valley	Director, Advisory Services & Labour Relations
University of the Fraser Valley	Director, Equity, Diversity & Inclusion
Vancouver Community College	Dean, Indigenous Initiatives
Vancouver Community College	Director, Facilities Management
Vancouver Island University	Dean, International Education

Client	Position
York University	Director, Continuing Professional Education
York University	Director, York University English Language Institute (YUELI)
York University	Open Rank - Indigenous Health Policy & Management
Yukon University	Dean, Applied Science & Management Division

PROJECT LEAD, TEAM QUALIFICATIONS & EXPERIENCE

Having offices in multiple cities provides us with an expansive national footprint and reach and enables us to maintain a current and deep knowledge of relevant talent across the country. We will leverage this broad-based network of potential candidates and sources to ensure we attract a broad, diverse, and qualified candidate pool for every search.

Project Lead: Ardyce Kouri | Partner, Edmonton



Ardyce has been a key member of the Edmonton office since 2004 and is known for her outstanding commitment to clients. She has brought her comprehensive HR knowledge and business experience to search assignments in the private, public and not-for-profit sectors. Prior to joining Davies Park (now Leaders), Ardyce worked in both Toronto and Prague as the National President for AIESEC Canada, and in recruitment for the ING Group’s Czech Republic branch. Ardyce holds a bachelor’s degree from the University of Alberta and a master’s degree from Royal Roads University. She is an active member of the community and currently sitting as a member of the AIESEC Canada Board of Directors.

Project Support: Shalini Bhatta | Partner, Calgary



Shalini Bhatta is a Partner in our Calgary office and has held a variety of roles with Leaders since 2005. She began her executive search career in Toronto and has partnered with clients across Canada to successfully execute search assignments in the post-secondary, financial services, energy, private equity, technology, and not-for-profit sectors. She also led the in-house talent acquisition function for an international energy company during a time of significant growth. With an extensive network of executives and senior leaders, Shalini builds strong candidate relationships and leads client engagements as a trusted advisor to identify and attract top talent into key roles. Shalini is a co-Chair of our National EDI Committee and leads our Diversity Practice in Western Canada. She holds a bachelor’s degree in Commercial Studies from the University of Western Ontario and is a Chartered Professional in Human Resources (CPHR).

Heather Fookes: Senior Consultant | BA, MLIS



Heather joined Leaders International's Calgary office in 2008 and has partnered with the Vancouver, Edmonton, Saskatchewan, Toronto and National Indigenous practice teams. She was Calgary's Director of Research for many years, moving into a Senior Consultant role in late 2017. She works closely with clients to evaluate, collaborate and deliver on their recruitment strategies, ensuring high quality service throughout all stages of the search. Heather can take an assignment from the initial profiling meeting through to conclusion and has participated in many of Leaders' most complex searches. She enjoys the challenge that search provides.

Heather is trained as a professional librarian with an honours degree from the University of Calgary and a Master of Library and Information Studies from Dalhousie University. As a member of the Association of Executive Search Consultants (AESC) she obtained its Certified Researcher Associate (CRA) designation and was awarded the 2014 AESC Research Excellence Award. Recent professional development includes training in EDI recruitment.

Project Advisor: Allan Nelson | Partner, Calgary



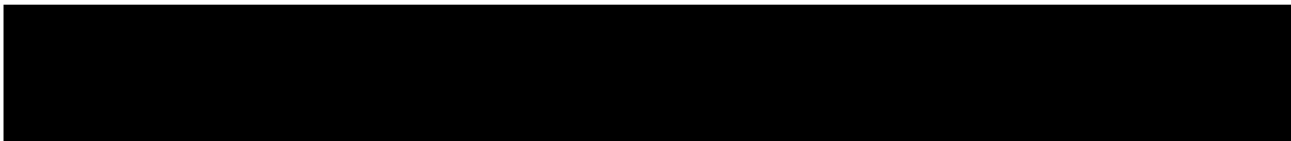
Allan a Partner in the Calgary office joined Davies Park and founded the Calgary office in 1997 and subsequently collaborated closely with his Partners to expand the business from offices in Edmonton and Calgary to include Vancouver, Toronto and Saskatoon. Through 2017-18 he played a key role in the merger of Davies Park with Leaders & Co. further expanding the national presence to include Montreal, Ottawa and Winnipeg.

Prior to joining the firm, Allan held senior positions in leadership, operations and sales management with a variety of Canadian corporations. He holds a Bachelor of Commerce degree from the University of Alberta and is a Chartered Professional Accountant (CPA/CMA). In 2002 he received the designation of FCPA/FCMA.

Other key members of Leaders International's team will support all project leaders. Our firm includes more than 35 full-time search consultants, researchers, and administrative staff. All employees at Leaders have been involved in searches across a full range of industry sectors. This diverse experience enables our staff to apply best practices from various industries and leverage those to every search. Understanding that every client is unique in their needs, we will tailor our approach to meet the specific requirements of MU.

APPROACH & METHODOLOGY

Front-End Preparation / Stakeholder Engagement



As a key benchmark tool and working document for the search, the Opportunity Profile includes:

- Key information on Memorial University;
- A detailed description of the role (including responsibilities and key priorities/challenges);
- Desired background, education, and experience required of the ideal candidate;
- Key success factors for the role and performance indicators.

Targeted Recruitment

Direct outreach and recruitment are the most successful method of executive identification as it targets the candidates aligned with the stated skills and expertise. To enhance Leaders' established pool and networks, a specific research strategy is created with in-depth market research aimed at identifying qualified candidates in the national marketplace. The Leaders team approaches qualified individuals, on a confidential basis, to determine their interest in the position and/or solicit referrals. Part of Leaders' market research program utilizes electronic means and social media to generate additional qualified candidates.

Database and Professional Contacts

The search team will review the Leaders database to identify networking contacts and potentially interested candidates. This database is extensive, up-to-date, and has been built over the past 34 years, containing over 1,000,000 names of organizational leaders worldwide.

Communications Strategy

Leaders does not rely on advertising. In fact, our experience has demonstrated that with diligent front-end preparation and a strategically designed research plan, direct sourcing will yield a significant majority, if not all, finalist candidates. Exceptional leadership candidates are often focused on their current mandates, and unaware of opportunities until being contacted. We see advertising as a supplementary activity and a means to ensuring public visibility, and to deepen the candidate pool. Our advertising recommendations are researched, strategic, and directly relevant.

Timely Communications and Reporting

Our team closely monitors the progress of every search and understands the importance of transparency. The Project Lead maintains ongoing communication and provides weekly Progress Reports throughout the recruitment process. Included in these reports are the number of sourced candidates, number of resumes received, and ongoing feedback from the market on the role and MU.

Screening and Assessment

Leaders has a proven, in-depth and highly due-diligent screening methodology. Screening and assessment of applicants is conducted with a comprehensive step by step approach.

Review of Resumes

Leaders will screen applicant resumes to ensure qualifications and experience align with the requirements of the job. This involves reviewing resumes, cover letters, and other application materials submitted by candidates. The goal of candidate screening is to identify the most qualified and suitable candidates for longlist presentation.

During the screening process we look for specific qualifications and experience that align with the requirements of the job. This may include a specific degree or certification, relevant work experience, or specific skills and abilities.

Selection Committee members will be provided with a Resume and Cover Letter of each candidate presented with our recommendations. The Selection Committee provides us with their feedback on the applicants and a longlist of candidates is identified.

Longlist Evaluation & Assessment

Longlist candidates are then evaluated in an intensive behavioral and competency-based interview process conducted by Leaders. Each candidate's leadership experience, managerial competence, accomplishments, career progression, personal characteristics, strengths, and areas for development are thoroughly examined and documented.

Competency Table

We will also forward the candidate a Competency Table (CT) to complete. The table asks five (5) or six (6) questions designed to draw out their experience for each of the key competencies identified by the Selection Committee for the role.

A confidential written report for each interviewed candidate will be provided to the Selection Committee with a recommendation for shortlist interviews.

Candidate Interview Process

Leaders will organize and facilitate the interview process. We will provide a draft Interview Guide for the Committee's review and incorporate their suggestions and edits. ***The Project Lead will be present during the candidate interviews and be available for debriefing following the meetings.*** We will manage any candidate follow up and facilitate any further interviews and/or presentations.

Additional Candidate Due Diligence

Reference Checking

Through years of experience, we have developed effective questions and techniques to yield thorough information about the candidate. We design reference questions for each unique search based on specific criteria and expand on all identified strengths and areas for development. This important information is presented to you in a summary report.

We also get written consent from candidates to pursue other references that are not on their list to ensure we are getting a thorough and unbiased understanding of their competencies and experience.

Assessments - PXT Select™

To further enhance our evaluation process, Leaders utilizes a proprietary leadership assessment tool called PXT Select™ which measures three areas that impact an individual's approach to situations in the workplace: Thinking Style, Behavioural Traits and Interests.

A PXT Select™ Assessment and report for the shortlist candidates is included in our professional fees. There is a charge of \$1,000 per additional candidate to administer the PXT Select™ Assessment. Although we recommend using PXT Select™, Leaders is agreeable to facilitating the use of an alternative assessment tool at MU's request.

Pre-Employment Checks

Leaders uses a reputable international third-party, Xpera, to provide Criminal, Credit and Social Media Checks, as well as Education and Credential Verifications.

Finalizing the Search

Facilitating Negotiations

Once a preferred candidate is selected, Leaders will help facilitate offer negotiations with the candidate on behalf of MU. We have experience finalizing offers with candidates in some complex situations and are happy to support you through this process.

Releasing Candidates

Leaders ensures that all unsuccessful candidates are respectfully advised and offered feedback, if appropriate. We feel it critical to treat all candidates professionally. We will acknowledge all applicants, notifying them about their status as the search progresses, and informing them of any changes in the process. Internal candidates can be particularly sensitive and will be addressed with the utmost tact and diplomacy.

Post Selection Follow-Through

Once selected, we stay in touch with the chosen candidate on a regular basis to ensure their transition into the organization and role is proceeding smoothly. Using the start date as a benchmark, Leaders maintains communication with follow-up calls to the successful candidate and MU at three, six, and 12 months to monitor progress.

CONFIDENTIALITY

Leaders International shall treat all information exchanged in this search as strictly confidential, including any proprietary and/or confidential information received pursuant to the search assignment outlined herein. We will exercise the same degree of care as we do for our own proprietary information. Candidate confidentiality will also be protected and not disclosed to anyone outside of the relationship between Leaders and MU. Our database repository, which includes all client assignments, is encrypted to the highest standards.

MONITORING PERFORMANCE & CLIENT SATISFACTION

The Leaders search process includes built in check points to ensure we are meeting the Selection Committee's (SC) expectations, agreed upon at the onset of the search. These include:

- **TIMELINE:** A Search Timeline outlining key dates and performance milestones will be developed in advance of each engagement by Leaders Executive Search (Leaders) which is subsequently reviewed and approved by MU Selection Committee. This timeline will help to monitor performance and keep the search on track.
- **UPDATES:** After week three of the search Leaders will provide written regular updates to the SC detailing the progress of the search as compared to the timeline while also highlighting potential candidates. This allows the SC to monitor the progress of the search, the calibre of the candidates, and Leaders' performance as compared to expectations. Leaders welcomes all feedback from the SC.
- **OPPORTUNITY PROFILE:** The Opportunity Profile, developed jointly by Leaders and the SC, will be used as a benchmark document throughout the search to monitor the quality of the candidates. Leader's process includes 8+ points of candidate evaluation, each time comparing to the Opportunity Profile to ensure we are on track. These include reviewing the candidate cover letter and resume, requiring each candidate to complete a self assessment based on the qualifications and experience outlined in the Opportunity Profile, a short prequalifying interview by Leaders, the long-list meeting with the selection committee, an in-depth interview with Leaders, a short-list meeting with the selection committee, selection committee first interview, selection committee second interview, and the Leaders due diligence process on the finalist candidates.
- **LEADERS/MU COMMITMENTS:** Leaders International makes the following commitments to all clients. These commitments ensure that our searches conclude successfully, efficiently and within budget:
 - Have a culture of transparency with open and honest communication throughout the search (both parties).
 - Provide timely responses to questions and feedback (both parties).
 - Set clear expectations, timelines and milestones for the search (both parties).
 - Dedicate the most experienced and aligned people to the search (both parties).
 - Plan the search utilizing a sound and proven project methodology (Leaders).
 - Set clear agendas for meetings and adhere to meeting times (Leaders).
 - Ensure materials are sent in advance of meetings so that there is ample time for review (predominantly Leaders, but both parties).
 - Use technology wherever possible to reduce costs and ensure any unavoidable costs are approved by the client in advance (Leaders).

RISK MITIGATION STRATEGY

We believe in ongoing, transparent and timely communication with our clients. Since we function as an extension of the University, we feel it is important that the MU Selection Committee is kept apprised of the search status at every step of the process, reducing and mitigating the risk of an extended timeline or an unsuccessful hire. As part of our Risk Mitigation Strategy, Leaders International makes the following commitments to all clients including MU. These commitments ensure that our searches conclude successfully, efficiently and within budget:

Risk	Selection Committee's Considerations	Leaders International's Mitigation Strategies
Confidentiality	<p>During any public search process candidates are concerned about the confidentiality of their candidacy. Many are presently employed and are concerned that their candidacy in another role may be perceived negatively by their current employers. When confidentiality is not professionally managed, it discourages strong candidates from applying and can create reputational risks for MU.</p>	<p>Leaders International has key systems and processes in place to protect candidate confidentially. As part of our systems, we have secure servers (<i>software and hardware</i>) to protect candidate information and applications.</p> <p>Committee materials shared throughout the search process (e.g., <i>resumes, candidate dossiers, reference reports</i>) are collected after each meeting and maintained by Leaders International until the completion of the search. At the end of the successful search all committee documents (including committee members' written notations) will be destroyed. Leaders International will maintain the official file.</p> <p>All committee members are reminded of confidentiality requirements at the outset of every key meeting throughout the search process. We would also recommend that all committee members sign confidentiality agreements relative to the search process.</p> <p>All Partners and staff of Leaders International adhere to a code of ethics regarding confidentiality and do not discuss candidate information in public.</p>
Organizational Fit	<p>Potential candidates will want to have a strong appreciation of the key opportunities and challenges facing the organization, the community and the position before applying.</p>	<p>To ensure clarity about this opportunity, Leaders International conducts stakeholder engagement sessions, either one-on-one, or in a focus group setting. These stakeholders (as agreed upon by the Selection Committee) could be internal and external to the organization. They can provide information regarding the current state of the organization, strategic directions for the future, and the ultimate measures for success for the incumbent.</p> <p>In addition, Leaders International, will function as your external voice during this search process and will be representing MU. We want to ensure that any</p>

Risk	Selection Committee's Considerations	Leaders International's Mitigation Strategies
<p>Timely Completion of a Successful Search</p>		<p>individual who shows interest in the position is treated professionally and promptly. As a result, all applicants are acknowledged by Leaders International and provided with verbal/electronic updates on the status of their application as the search progresses.</p> <p>Once a long list has been determined, unsuccessful candidates are notified verbally or electronically. A similar process is undertaken to close out long listed candidates who do not move forward to short list.</p> <p>Once short list interviews have been conducted, unsuccessful candidates (internal & external) are provided with a comprehensive debrief and feedback on their interview and candidacy.</p> <p>To meet the Selection Committee's specified timeline for a search, Leaders International would commit a team of resources dedicated to each assignment. This includes a Partner Lead, a Partner Support, a Lead Consultant, and a research team from across Canada.</p> <p>Leaders International's team will provide timely and regular written, verbal and/or in person updates to confirm that we are identifying relevant candidates who meet MU's needs. Because of our regular communications, we can adjust our search strategy and approach as required.</p> <p>We continue to research and identify new and relevant candidates, throughout the entire search process, until a final selection has been made.</p>
<p>Identification of Candidates</p>		<p>Leaders International considers the risk of identifying "unsuitable" candidates as <u>extremely low</u>.</p> <p>Over 34 years, we have a proven, due diligent, and demonstrated record of targeting and identifying qualified candidates in senior positions.</p> <p>Leaders International engages candidates from the very first discussion and ensures they are fully committed, fully cognizant of the role (its responsibilities, culture of the organization), and their responsibility and accountability in the position.</p> <p>Several discussions are held with candidates over the course of the search to confirm their interest, suitability and commitment to the position and the organization.</p>

PROJECT MILESTONES AND DELIVERABLES

Each search we undertake follows an **10-12-week period**. The table below provides an overview of the key milestones, deliverables, and timing for a typical search assignment. Leaders is flexible and open to discuss any adjustments that may be required to meet MU's needs and timelines.

Milestone	Description	Deliverable	Completion Date
Preparation	<ul style="list-style-type: none"> ➤ Establish search strategy ➤ Meet with key individuals ➤ Agree on candidate specifications 	<ul style="list-style-type: none"> ➤ Opportunity Profile 	1 Week
Candidate Identification, Attraction, and Preliminary Screening	<ul style="list-style-type: none"> ➤ Conduct industry research ➤ Source industry experts ➤ Search database ➤ Draft/place advertisements ➤ Direct contacting ➤ Screen candidates 	<ul style="list-style-type: none"> ➤ Verbal Updates ➤ Written Updates ➤ Long List Report 	5-6 Weeks
Candidate Evaluation	<ul style="list-style-type: none"> ➤ Conduct interviews ➤ Review short list with client ➤ Prepare client/candidate for interviews ➤ Leadership assessments ➤ Additional evaluations as required 	<ul style="list-style-type: none"> ➤ Short List Materials ➤ Candidate Dossiers ➤ Leaders Report® ➤ PXT Assessments 	2 – 3 Weeks
Final Selection	<ul style="list-style-type: none"> ➤ Coordinate finalist interviews ➤ Complete Reference checks ➤ Prepare summary report ➤ Assist in offer of employment 	<ul style="list-style-type: none"> ➤ Reference Summary ➤ Offer Accepted 	2 Weeks
Finalizing the Search and Follow-up	<ul style="list-style-type: none"> ➤ Assist with candidate transition to new environment (relocation) ➤ Feedback to unsuccessful applicants ➤ Communicate with candidate and client on an ongoing basis 	<ul style="list-style-type: none"> ➤ Onboarding Plan ➤ Candidate Feedback ➤ Client Follow-up 	1 Week

RESPONSIBILITIES: TEAM LEADS & RESEARCH STAFF

Leaders will tailor searches to MU's needs. The Primary Contact for this search will be Ardyce Kouri, Partner. Consultants and Research staff may be included from other Leaders' offices in Canada as required.

Partners / Senior Consultants – The Project Lead has overall responsibility and accountability for the success of the search engagement and is the key contact for MU. The Project Lead is the key contributor throughout each engagement. Some responsibilities include managing the Search Team, providing facilitation and advice to MU, interviewing and evaluating candidates, contacting key candidate references, and negotiating the offer, to name a few.

Research Team – The Research team will be responsible for developing the search strategy as it relates to candidate identification. This team may also be involved in the initial contact of potential candidates, pre-screening, drafting client updates, reference checking and other candidate due diligence.

OUR DIVERSITY PRACTICE (EDI)

Leaders emphasizes the importance of **Equity, Diversity, and Inclusion (EDI)** principles internally and with our clients. During every search, we work hard to ensure that EDI principles are embedded throughout the search process. This includes supporting gender-neutral language, diversity in the images that we use, and ensuring accessibility compliance.

Canadian Council for Aboriginal Business (CCAB) Accreditation

Our team has pioneered a national Indigenous executive search practice that has been awarded a Gold Level Progressive Aboriginal Relations Award (PAR) by the Canadian Council for Aboriginal Business (CCAB).

We conduct searches in accordance with EDI best practices by:

- Reviewing the **terminology used in documents** to ensure that the lens through which we review candidate qualifications is free of bias.
- Connecting with our **diverse network of contacts** for referrals of possible candidates in equity-seeking groups within Canada.
- Suggesting advertisement **venues** that target equity seeking groups.
- Searching our internal database of more than one million candidates to identify those who have self-identified as members of **underrepresented groups**.
- Guiding client search committees on best practices for assessing candidate skills in a **non-biased** manner (e.g., unconscious bias principles).
- Abiding by accessibility requirements.

Internally within our firm, we have committed to supporting EDI training and workshops, including bringing in EDI speakers, conducting internal diversity surveys, and hosting Lunch and Learn sessions on EDI topics for our search staff.

We are proud members of the Canadian Centre for Diversity and Inclusion (CCDI). This enables our team members to have access to and be trained in the most robust DEI recruitment practices.

FEES & DISBURSEMENTS

Leaders is a retained and exclusive executive search firm. Our standard professional fee is 25% of the selected candidate's estimated first year cash compensation (salary plus estimated variable pay). **We are prepared to offer a fixed professional of \$80,000 to complete this search.**

Disbursements

Out-of-pocket disbursements are additional and are charged at our cost. They include such items as:

- advertising (if required and as approved by MU);
- consultant travel (if required and approved by MU);
- candidate travel (as approved by MU).

We will not charge for administrative services and costs associated with long distance phone calls, printing, arranging candidate travel and accommodations, criminal, credit and credential checks, and carrying costs for payment of candidate and advertising expenses related to the search.

Payment Terms

Professional fees are billed in three parts with the first invoice issued when the assignment commences. That invoice represents an estimate of the first one-third of Leaders International's professional fee. The second invoice is issued at the end of month two, and the final invoice is timed with the acceptance of an offer of employment.

Additional Candidates

Occasionally, a client will extend an offer to more than one candidate generated from a single search. Additional candidates generated by this search, and subsequently hired by MU, will be billed at 20% of their first-year base salary.

REPLACEMENT POLICY: OUR GUARANTEE

Leaders International has a reputation of success and providing quality service to clients and is prepared to stand behind all placed candidates. **If a candidate placed by us leaves for any reason within 12 months of starting employment, a new search will be conducted at no cost to MU,** other than disbursements, provided the profile has not changed.

POINTS OF DIFFERENTIATION

There are many firms that provide executive search services, but Leaders International Executive Search is unique. We transform organizations and the leaders who work for them—we are executive recruiters on a mission to innovate and deliver excellence. In so doing, we have developed a reputation for delivering superior results and impact.

Overall, Leaders International:

- Has strong and relevant experience recruiting to the post-secondary sector.
- Uses an initiative-taking, highly research-oriented “headhunting” approach for sourcing candidates.
- Is an established and reputable executive search firm with over 34 years of success.
- Has a designated team assigned to the project and can start immediately.
- Provides a boutique service philosophy with international experience and reach.
- Provides an unequivocal guarantee on all placed candidates.

CONCLUSION

It would be Leaders International’s distinct pleasure to work with Memorial University to assist in the recruitment of your next President & Vice-Chancellor. Should you require any further clarification on our services, please contact:

Ardyce Kouri, Partner

Leaders International Executive Search

(780) 420-9900

Ardyce@leadersinternational.com



www.leadersinternational.com

APPENDIX B – SUBMISSION FORM

1. Proponent's Information

Please fill out the following form, naming one person to be the Proponent's contact for the Open Call process and for any clarifications or communication that might be necessary.	
Full Legal Name of Proponent:	KBRS Executive Search
Any Other Relevant Name under which Proponent Carries on Business:	---
Street Address:	Baine Johnston Centre, Suite 102, 10 Fort William Place
City, Province/State:	St. John's, NL
Postal Code:	A1C 1K4
Phone Number:	709.722.6890
Fax Number:	709.722.8685
Company Website (if any):	kbrs.ca
Proponent's Contact Name and Title:	Jennie Massey, Partner, KBRS
Proponent's Contact Phone:	709.722.6846
Proponent's Contact Fax:	Same as above
Proponent's Contact Email:	jmassey@kbrs.ca

2. Offer

The Proponent has carefully examined the Open Call documents and has a clear and comprehensive knowledge of the Deliverables required under the Open Call. By submitting a Proposal, the Proponent agrees and consents to the terms, conditions and provisions of the Open Call, including the Form of Agreement, and offers to provide the Deliverables in accordance therewith at the rates set out in the pricing section.

3. Rates

The Proponent has submitted its rates in accordance with the instructions in the Open Call. The Proponent confirms that it has factored all of the provisions of Appendix A, including insurance and indemnity requirements, into its pricing assumptions and calculations.

4. Addenda

The bidder is deemed to have read and accepted all addenda issued by the Owner. The onus is on bidders to make any necessary amendments to their bids based on the addenda. The bidder is required to confirm that it has received all addenda by listing the addenda numbers on the following line: **(For example, if Addendum 1 has been issued, enter 1 on the line. If there are two addenda, enter 1, 2.)** N/A . Bidders who fail to complete this section will be deemed to have not received all posted addenda and shall be deemed **non-compliant**.

5. No Prohibited Conduct

The Proponent declares that it has not engaged in any conduct prohibited by this Open Call.

6. Disclosure of Information

The Proponent hereby agrees that any information provided in this Proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The Proponent hereby consents to the disclosure, on a confidential basis, of this Proposal by the Owner to the advisers retained by the Owner to advise or assist with the Open Call process, including with respect to the evaluation of this Proposal.

7. Proposal Irrevocable

The Proponent agrees that its proposal shall be irrevocable for a period of **90** days following the Submission Deadline.

8. Required Signatures


Failure to submit this signature section will render the Proposal NON-COMPLIANT and the Proposal will be disqualified.

Jennie Massey

Name of Proponent's Representative

Partner, KBRS

Title of Proponent's Representative

 s. 40 (1)

Date May 16, 2024

I have the authority to bind the Proponent.

IN SIGNING THIS PAGE AND SUBMITTING YOUR PROPOSAL, THE PROPONENT ACKNOWLEDGES HAVING READ AND UNDERSTOOD AND AGREED TO THE TERMS AND CONDITIONS OF THIS DOCUMENT.



KBRS Executive Search Proposal

IN THE RECRUITMENT OF A

**President and Vice-Chancellor
FOR**

Memorial University of Newfoundland

SUBMITTED

May 16, 2024

PROPRIETARY AND CONFIDENTIAL

PREPARED BY

Jennie Massey, PhD, Partner

KBRS (Knightsbridge Robertson Surette)

Baine Johnston Centre, Suite 101,

10 Fort William Place, St. John's, NL, A1C 1K4

709.722.6846

jmassey@kbrs.ca

www.kbrs.ca • 1.866.822.6022

Executive Search Proposal

President and Vice-Chancellor, Memorial University of Newfoundland

KBRS

002-17-400-24

May 16, 2024

Glenn Barnes
Chair, Presidential Search Committee
Memorial University of Newfoundland
opencalls@mun.ca

Dear Glenn,

Thank you for the opportunity to submit our proposal for the search for your next President and Vice-Chancellor. It has been our pleasure to work with Memorial University in the past. We are deeply invested in your success, and my entire team is hopeful we can continue our collaboration on this critical hire for the university. We are confident that we are the best choice to support the university in hiring this key leader. As a former employee and community member in St. John's, I care deeply about MUN and am personally committed to its success.

The last five years have fundamentally changed education. We are all still adjusting after the disruption of the pandemic, an increasingly unpredictable climate, and a changing labor market. These factors, coupled with MUN's unique challenges, underscore the importance of finding the right leader to chart a visionary path forward. While this may seem overwhelming, it also presents a significant opportunity for growth. MUN's uniqueness, like that of our community and province, means the choice of this leader can transform the university's future through courageous and innovative leadership. You need someone who prioritizes people and culture, while creatively navigating nuanced contexts and relationships. A strong relationship-builder with empathy and foresight, capable of understanding MUN's unique identity, while strategically navigating challenges and disruptions. Someone who will enhance the University's brand while maintaining its integrity during pivotal decisions. I know this because I am thinking not only as a search consultant but also as an educator and past executive leader in higher education. I am confident in our ability to find the right leader because I have been in that position myself.

Leadership searches are more challenging than ever. Traditional executive search approaches no longer guarantee success, so I have assembled a team of experts with decades of experience in education and recruitment. We need the best people working alongside us to navigate the new challenges of a post-pandemic world, and I have surrounded myself with top talent. I hire the best to work with me, and I will do the same for you.

Who you choose to support you in this search matters. We aim to be an active partner, empowering academic and administrative leaders on your campus to make decisions with lasting impact. Our ultimate goal is to ensure this search is logistically smooth and intellectually stimulating, by introducing you to candidates with diverse backgrounds and facilitating search committee decisions at every step. Our unique qualitative consultation process, communications planning, meeting facilitation, and onboarding support ensure that the candidates we place, and the institution itself, are set up for success.

This is a significant decision, and I hope our proposal demonstrates our skill, care, and excellence. I look forward to hearing from you and hope to join you in finding a new leader to usher in the next phase of Memorial's legacy.

Sincerely,



s. 40 (1)

Jennifer Massey, Partner, KBRS

Executive Search Proposal

President and Vice-Chancellor, Memorial University of Newfoundland

KBRS

002-17-400-24

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KBRS



Consultations & Communications

We offer distinctive consultation and communication support. Our consultations are conducted with the same rigour as a qualitative research study and present you with a summary report organized by major themes. We also prepare draft communications for you to distribute at all major milestones.

Equity, Diversity, and Inclusion

We are knowledgeable in EDI best practices and offer training to search committees while helping you critically evaluate the way candidates are recruited, assessed, and selected. We actively engage diverse pools of qualified candidates, employing accessible communication strategies and removing barriers to success.

We Know Higher Ed

As Canada's largest academic search practice, KBRS is uniquely qualified to support you. Our team is different from other firms—I spent most of my career working in higher education as a professor, and then an executive leader. My team includes significant post-secondary work experience as well. We understand academic culture and networks because we've been there.

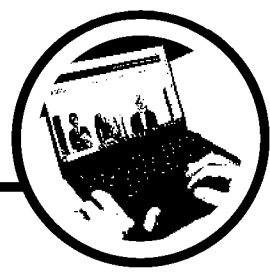
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of Candidate Pools we presented to clients in the last 12 months included diverse identities.

"Jennie's extensive experience working in education leadership roles was a major asset throughout the search process. The search team went to great lengths in the consultation process to understand our culture. Based on their vast networks, Jennie's team was well positioned to bring forward a substantial pool of qualified applicants. Jennie's ability to facilitate committee meetings and bring an academic search committee to consensus was exceptional. Her ability to problem solve and address varying opinions while upholding institutional values was commendable. The planning and scheduling of the search process was meticulous, and the search team ensured that we kept on target while being flexible and adaptable to our needs. They were always available for consultation and advice, kept a positive but realistic outlook, and were friendly and personable throughout. The level and breadth of service in providing updates to the committee, preparing communications, planning for interviews, and onboarding of candidates was impeccable."

Dr. Michael Khan, Provost and Vice-President, Academic, Trent University, 2023

Our Process



| Strategic Alignment

We research the current context of the organization, work with the Search Committee Chair to set goals, and ensure all understand these goals and act in alignment. We then draft recruitment documents including an advertisement and executive brief.

| Candidate Attraction

We leverage our own vast network and create a bespoke recruitment strategy to bring forward a robust pool of highly qualified and diverse candidates.

| Assessment & Decision

We recommend the strongest candidates for your consideration, support shortlisting and coordinate interviews so that you make the best decision for your organization. We make the process easy, with a hard choice between exceptional candidates.

| Onboarding & Support

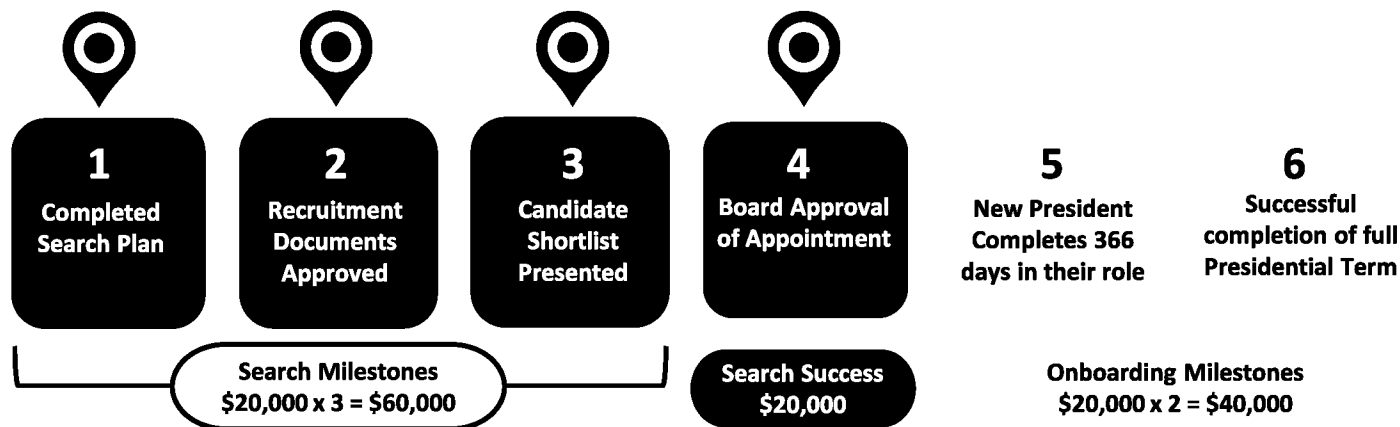
We offer personalized onboarding and support for your new hire, with recommended goals, priorities, development and a draft 90-day plan.

We guarantee we will continue our work until the right candidate is found.

1.866.822.6022 | kbrs.ca

Professional Fees

We recognize the unique challenges facing Memorial at present and how important transparency and pricing will be for this search. We propose that our fees are billed at 6 key search milestones to align with our deliverables. Each milestone will be charged at \$20,000 (exclusive of HST) with any approved expenses invoiced at cost (e.g. advertising costs, candidate or consultant travel).



Our Commitment to Newfoundland and Labrador

We are based in Newfoundland and Labrador and have recruited many senior leaders to key executive positions here. Simply put, we know how to recruit the right leaders for NL. Unlike other markets, so many things happen over a cup of coffee or at an evening gathering and it is important to find a President for Memorial that can successfully integrate. We make relationships our top priority and excel at taking all those little extra steps that make a big difference in finding the right candidate for the job. Things like coaching candidates so that everyone is at their best when you meet them, sending them good luck notes on the day of their interviews, providing immediate feedback afterward, and debriefing with each one. All this work takes time, but it really matters here in Newfoundland. And we know that.

Searches below represent a sample of our team's relevant current and past searches.

- | Acadia University
 2017 – President and Vice-Chancellor
- | Humber College
 2022 – President and Chief Executive Officer
- | Laurentian University
 2024 – President and Vice-Chancellor
- | Mount Allison University
 2018 – President and Vice-Chancellor
- | Northern College
 2024 – President and Chief Executive Officer
- | NSCAD University
 2019 – President
- | Ontario Tech University
 2018 – President and Vice-Chancellor
- | Sault College
 2023 – President
- | St. Jerome's University
 2020 – President and Vice-Chancellor
- | St. Mary's University (Calgary)
 2022 – President and Vice-Chancellor
- | St. Thomas University
 2023 – President and Vice-Chancellor
- | Wilfrid Laurier University
 2017 – President and Vice-Chancellor



Appendix A: Search Firm Overview

KBRS has been guiding organizations across North America to fill leadership positions since 1975. As one of the largest niche academic executive search and consulting practices in the country, as well as having our team based in Newfoundland and Labrador, we offer you an exceptional combination of highly qualified, experienced academic search leaders with background experience in both the United States and Canada; global reach and connections; and sensitivity to the current changes and future challenges in your sector, including the need to address equity, diversity, and inclusivity (EDI).

While our team has completed thousands of search assignments over the years, we are continually evolving to meet the needs of our clients and candidates. We take the time to truly understand your organization so we can help you identify the right leader for the role.

Our Strengths:

More than **45 years** experience in leadership roles in post-secondary institutions in Canada and the United States

More than **70** professionals across Canada

6 CPHRs
4 PhDs
16 master's degrees

More than **20** specialized academic recruitment professionals

Global reach and connections

In the past five years we have helped to place more than **260** leaders with more than **80** post-secondary institutions

Five KBRS attributes that will make your search successful.

1. We understand leadership in higher education

We have successfully placed thousands of leaders since our inception in 1975. We understand the challenges facing leaders on both a global and local level and what attracts them to want to work with organizations. Our search partners have extensive consulting and leadership experience and take a hands-on approach as trusted talent advisors during each search. We are not simply a recruitment firm. We draw on a wide array of expertise to create solutions that consider your needs, from succession planning to effective onboarding and coaching.

“ Ontario Tech has a long track record of success in filling key senior academic leadership roles when working with KBRS. In our most recent search, Jennie Massey and her team worked tirelessly match a highly qualified pool of applicants to our university community’s needs and aspirations. It was by far one of the strongest applicant pools that I’ve seen over the course of my thirty-year career.
Dr. Lori Livingston, Provost & Vice-President, Academic, Ontario Tech, 2023 ”

2. Equity, diversity, and inclusivity embedded in your search – and our organization.

Becoming an equitable, diverse, and inclusive (EDI) institution is a journey—one that requires frequent attention and adjustment. We know because we are constantly working to advance EDI in our own organization. We have an active EDI working group to inform the development of internal policies and refinement of processes in the way we work and support one another as well as our clients and candidates. We are also one of few search firms to have an EDI lead who, along with one of our managing partners, has completed a diversity and inclusion certificate program at Cornell University.

Engaging a diverse talent pool of qualified candidates is essential for the success of your recruitment strategy. Equally important is your ability to combat barriers that disadvantage underrepresented groups. Our consultants work in partnership with search committees to critically evaluate the way candidates will be recruited, assessed, and selected. Beyond this, we also work with search committees and hiring managers to consider the readiness of their organization to support candidates from underrepresented groups and develop a plan to ensure the success of all parties involved.

Our team at KBRS is also grateful to live and work on many different parts of the traditional territories of the Indigenous Peoples of Turtle Island. As we work with post-secondary campuses from coast-to-coast, as well as Indigenous scholars, academic leaders, and Elders involved in consultation work, we recognize the sovereignty of Indigenous Peoples and are grateful for the opportunity to address systemic inequalities that persist in the recruitment of academic leaders in partnership with colleges and universities.

We acknowledge that our head office is located in Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaq. We also have offices located on the territory of many nations including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee, and the Wendat peoples, in addition to offices on the ancestral homelands of the Mi'kmaq and Beothuk.

We know how important it is to work with Indigenous communities to decolonize search processes and are committed to listening and learning in each academic recruitment initiative we undertake. Rest assured the entire recruitment strategy for your search will have an EDI focus that results in a highly qualified and diverse candidate pool.

“ We have been so very pleased to be working with KBRS in our recent search. They used their connections to reach out to far more potential candidates than we could ever imagine and created an outstanding competition. Working through Dr. Jennifer Massey, we always felt that our needs were being heard and met. Her advice was solid and led us to an outstanding conclusion to our search. We could not have been happier with the care and service provided by everyone we dealt with. I'd highly recommend KBRS to anyone looking to advance their institution in the right direction!
Silvana MacDonald, Dean of Health, Community Services and Creative Design, Lambton College, 2022

3. Candidate care

When recruiting and screening candidates, we will always remain aware that their experience with us reflects on Memorial. We ensure all interactions are professional, personable, and pleasant. We also know candidates want to know about the real challenges of the role and organization—and the opportunity to prepare their answers and fully share their vision. We help candidates by providing them with timely information and supporting them to make their own best impression. As this quote from an unsuccessful candidate shows, we prioritize all our candidates' well-being and put kindness first as we support them.

“

Jennie, please know how impressed I have been especially with you, Kyle, and KBRS. Your careful attention to detail, your genuine concern to help candidates put their best foot forward, and your commitment to ensure your client gets the "right fit" were all very positive and a credit to your firm. Small things like the quick call we had to prepare for the interview and the note of encouragement from Kyle on the day of the interview really sets you and KBRS apart from other search firms I have worked with. I was very impressed!

Presidential Search Candidate, 2022

4. Long-term success

Clients engage us repeatedly for a reason. Our end goal is not to simply find an acceptable candidate – we are committed to finding the right leader for Memorial and will work until we do so. We partner with you to continue to source candidates until a leader is successfully appointed, for as long as it takes. We see this recruitment project as a partnership with you and seek to establish a mutual commitment to an honest, transparent process in which we can openly and frankly discuss all issues to enable you to come to the best decision. In addition, for Memorial, we have broken up our fee into search and onboarding phases to demonstrate that we are invested in not only placing a great candidate, but in supporting them so that they are able to fulfill their commitment as President.

5. Great hiring decisions

We ensure you are fully briefed on the goal and the process. We effectively support you by providing decision-making tools to assess, rank, and choose the candidates, as well as strategies to uncover and identify unconscious bias. Additionally, we can provide advice along the way with respect to change management, succession planning, market compensation, and onboarding.

“

There are many unknowns in the job search, which often resembles a journey to opportunity and responsibility. On the journey, candidates will encounter moments of self-doubt and reflection. Working with KBRS, Dr. Jennie Massey and her team took interest in me as a person as well as a candidate. They understood my needs and long-term vision for professional growth. I felt more prepared with each step forward, confident that I was on the correct path, with the support I required for success.

Dr. Ted Christou, Placed Candidate – Dean, School of Graduate and Post-Doctoral Studies, Ontario Tech University, 2022

KBRS Differentiators

We know that costs matter, but we also hope that you realize the different level of service you will get from a KBRS search, when comparing us with other firms that offer lower price points. Not all search firms are the same, and we take our work hiring the best senior leaders for our clients very seriously.

Some of the things that KBRS does differently than other firms are:

01 | We Are Experts.

- **Unparalleled Expertise in Senior-Level C-Suite Roles:** Our team brings extensive experience in navigating the complexities of executive leadership positions, providing invaluable insight and guidance garnered from years of hands-on involvement at the highest organizational levels.
- **Commitment to Equity and Inclusion:** Our commitment to inclusion extends beyond recruitment, as we work closely with committees to embed equity principles into every stage of the selection process, fostering environments where all candidates have equal opportunities to excel.
- **Guaranteed Success:** With our unwavering commitment to excellence, we have structured our fee to be paid in full only if we deliver results. We are invested in ensuring the board finds the right fit for long-term success.

| We Take Time to Understand You Before We Source Candidates.

Consultation for Success: Our consultation services are not just crucial—they're indispensable. By producing comprehensive reports for committees, we equip decision-makers with the knowledge and insights necessary for a successful search outcome.

Precision in Competency Development: We don't just identify competencies; we define them with precision. This is essential for inspiring talented candidates to apply and ensuring the committee is aligned about the essential skills and attributes required for success in the role.

Comprehensive Psychometric Leadership Assessments: Our suite of services includes cutting-edge psychometric assessments, providing invaluable insights into candidate suitability and potential for success in leadership roles.

Robust Candidate Research: Leveraging extensive industry networks and cutting-edge research methodologies, we conduct thorough outreach to identify top-tier candidates who not only meet the specified competencies but also bring unique perspectives and experiences to the table.

Intentionally Diverse Candidate Lists: Throughout the search process, we prioritize equity by proactively seeking out candidates from diverse backgrounds and ensuring their voices are heard and valued.

KBRS Differentiators

03 | We Take Care of Candidates so They Can Be at Their Best.

- **Exceptional Candidate Care:** Every interaction with candidates is a reflection of your commitment to professionalism and respect. We prioritize candidate experience, ensuring every individual feels valued and supported throughout the process.
- **Elevating Candidate Preparedness:** With our tailored pre-interview coaching sessions, we ensure candidates are empowering to effectively communicate their story and expertise—an invaluable asset in today's competitive landscape.

04 | We Vet Candidates so You Don't Have To.

- **Rigorous Candidate Screening:** Through meticulous 1:1 interviews conducted by multiple team members, we delve deep to evaluate candidates against the identified competencies, ensuring alignment with the committee's objectives.
- **Fulsome Background Checks:** Our commitment to thorough background checks ensures that every potential leader considered for the role has been meticulously vetted and assessed, resulting in a selection pool of the highest caliber candidates. This includes credential verification, social media review, criminal record, and financial checks.

| We Guide and Support You Through All Stages of Decision-making.

Empowering Board-level Decision-Making: Working with a Board? We specialize in steering boards through the intricate processes of search and appointment, leveraging our expertise to facilitate seamless decision-making and ensuring the selection of the most qualified candidates.

Expert Search Committee Facilitation: Our adept facilitators guide committees through every decision-making juncture, employing proven tools and methodologies to optimize outcomes and streamline the selection process.

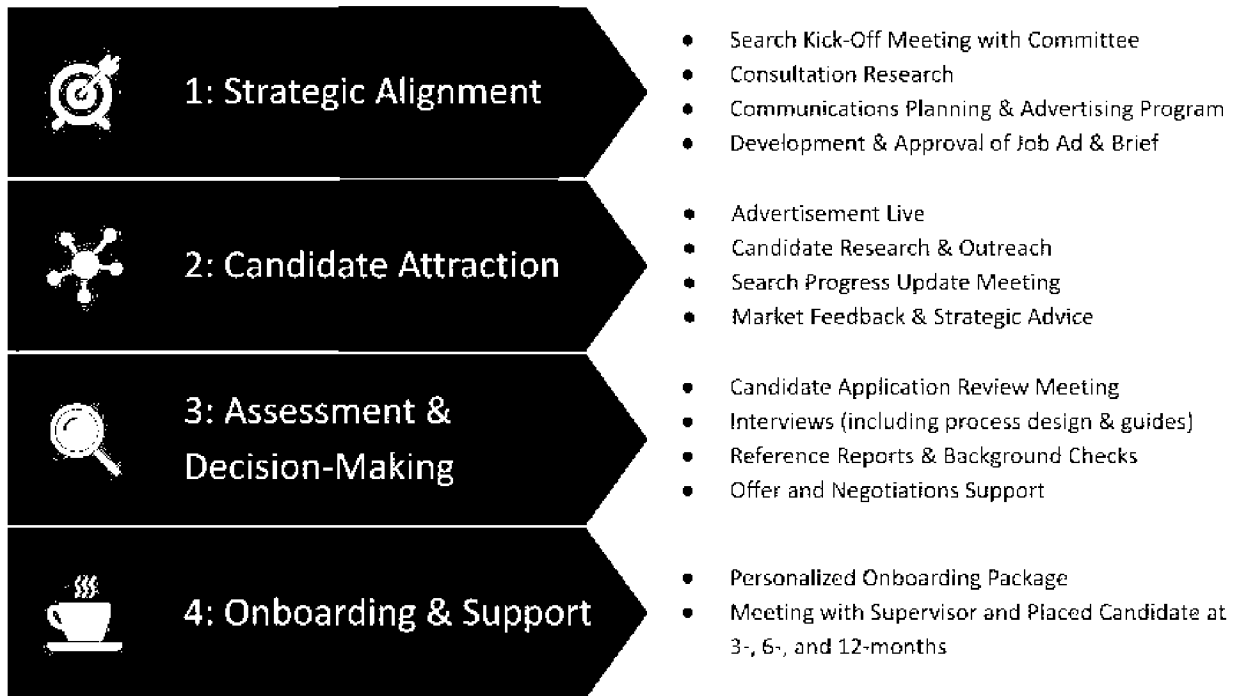
Seamless On-Site Second Interview Coordination: From travel arrangements to community tours, we handle every aspect of second interviews with meticulous attention to detail, ensuring candidates experience a seamless transition into the next phase of the process.

06 | We Don't Finish Just Because the Search Ends.

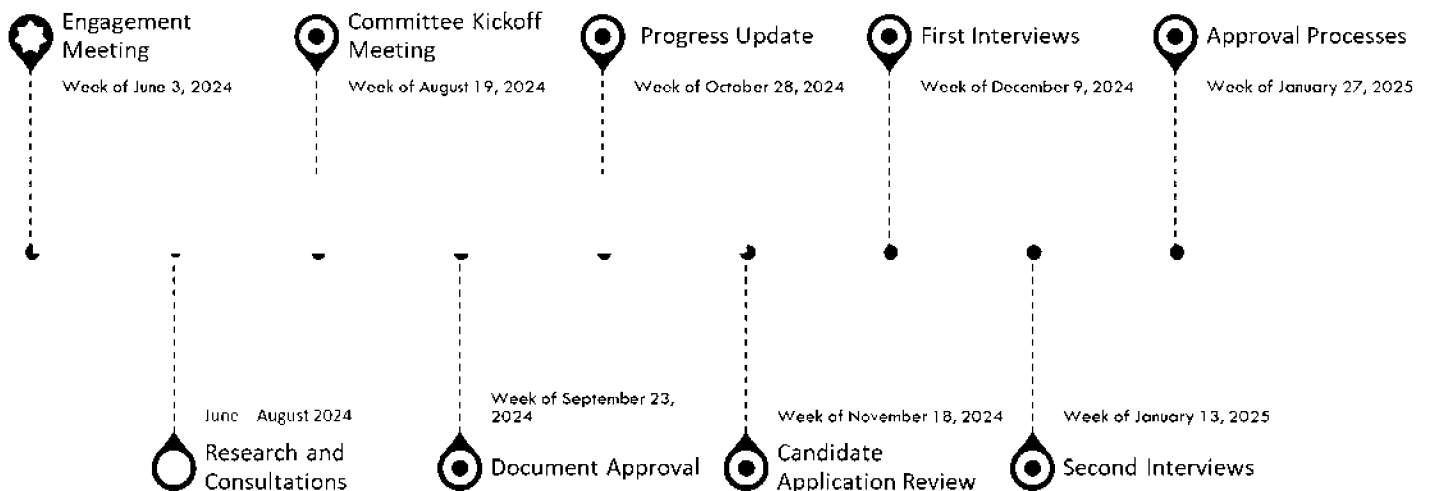
- **Negotiating Win-Win Contracts:** Landing the right candidate doesn't have to be a zero-sum game. We specialize in crafting agreements that satisfy both parties, ensuring that board and candidate alike are poised for success from day one.
- **Holistic Onboarding and Transition Support:** Our support doesn't end with the hire. We provide comprehensive onboarding plans, ongoing transition assistance, and regular follow-up check-ins to facilitate a smooth integration process.
- **Empowering Success Through Executive Coaching:** We offer personalized executive coaching to new leaders, equipping them with the tools and strategies needed to thrive in their new role and drive organizational success.

Appendix C: Proposed Search Work Plan

Our Process and Deliverables



Proposed Timeline *Please note, we can work with any timeline you need with a revised process.



Appendix D: Your Search Partners

We recommend the following partners to conduct your search, based on each member’s experience in academic search and alignment with your needs.

- Dr. Jennie Massey will be your Lead Partner/Project Manager and the primary point of contact for you, the search committee, and candidates on these searches.
- Kyle Steele will oversee the search process within KBRS and serve as a second point of contact for you.
- Debra Clinton will support Jennie and Kyle will lead our research and candidate outreach.
- Lesley D’Souza will create all search communications materials and conduct community consultations.



Jennifer (Jennie) Massey, PhD

Partner, KBRS

[Click for full biography](#)

Consultative and collaborative, Jennie’s recruitment style is informed by her extensive experience as a senior leader in post-secondary institutions in Canada, the USA, and the UK. As a Partner with the Executive Search Practice, Jennie is a strategic advisor and partner to NL organizations. She is a skilled communicator and facilitator, well equipped to support her clients’ most critical leadership decisions. Her commitment to equitable recruitment processes results in the attraction and selection of the leaders that today’s institutions need to succeed.



Kyle Steele

Executive Search Consultant

[Click for full biography](#)

Fueled by enthusiasm for client-service excellence, with a well-developed ability to think strategically and ‘outside of the box’, Kyle matches academic institutions as well as public and private sector organizations with ideal candidates. Kyle’s approach to the recruitment of academic and other executive leaders is informed by 11 years of leadership within the post-secondary enrolment management sector. Prior to joining KBRS, Kyle worked as a public sector consultant, focused on complex projects related to the COVID-19 pandemic, continuing care, and public health.



Debra Clinton, BSc
Executive Recruiter

[Click for full biography](#)

Debra effectively identifies and assesses the cultural fit between candidates and clients by leveraging her behavioural psychology background and research capability. Debra has over a decade of executive recruitment experience coupled with a background in management gained over her more than 30-year career. Prior to joining KBRS, Debra worked as an Executive Recruiter and Research Consultant for a Toronto-based information research firm. She also held various titles during her 20 years with a Toronto-based executive search and human resources consulting firm. She has earned a reputation for candidate identification and service delivery, primarily focused on the public sector, including municipalities, academic institutions, and libraries, as well as finance, hospitality, real estate, construction, and manufacturing.



Michelle Doyle, BMus

Executive Recruiter - [Click for full biography](#)

A skilled communicator adept in problem-solving, working under pressure, and rapidly adjusting to competing demands – Michelle is a valued member of our Executive Search team. She is a strategic thinker with experience in business administration, event coordination, and project management. Michelle has a Bachelor of Music degree from Memorial University of Newfoundland as well as a Diploma in Music Theatre Performance from Sheridan College. In her downtime, Michelle can be found spending time with her daughter, on a running trail, or in the kitchen developing a new recipe.



Lesley D'Souza, MA

Recruitment and Communications Coordinator

[Click for full biography](#)

Lesley is a skilled researcher and communicator with a proven record of designing effective storytelling materials. She approaches each search with empathy and curiosity, looking for insights on what is needed. Before joining KBRS, Lesley worked in higher education, both in Canada and the United States, for over 17 years. As an established Student Affairs leader, she focused on strategic planning, assessment & research, digital community building, and communications & marketing. She is an accomplished public speaker and continues to train on data storytelling and decolonizing research and assessment in higher education.

Appendix E: Relevant Experience

KBRS has an extensive record of success in recruiting senior leaders with thousands of searches successfully completed over the past 45 years. We have built and maintained an extensive network with leaders whose expertise and experience we can draw upon for advice and for suggestions of candidates. In a recent survey, 97 percent of clients have said they were satisfied with the quality of service AND would use us again.

Selection of Relevant Academic Search Experience

Below is a selection of executive searches that we have successfully led in recent years for executive leadership positions within post-secondary education:

Academic Executive Searches

Organization	Position (Presidential and Vice-Presidential)
Acadia University	<ul style="list-style-type: none"> • President and Vice-Chancellor
Alberta College of Art and Design	<ul style="list-style-type: none"> • Provost and Vice-President Academic
Algoma University	<ul style="list-style-type: none"> • Vice-President, Finance and Operations • Vice-President, Academic and Research • Principal, Brampton Campus
Brescia University College	<ul style="list-style-type: none"> • Vice-Principal and Academic Dean • Provost and Vice-President, Academic
Brock University	<ul style="list-style-type: none"> • Associate Vice-President, Equity, Diversity and Inclusion • University Secretary and Associate Vice-President Governance and Policy
College of the North Atlantic	<ul style="list-style-type: none"> • President & CEO • Assistant Vice-President, Human Resources
Dalhousie University	<ul style="list-style-type: none"> • Chief Information Officer/Assistant Vice President Information Technology Services • Vice-President Finance and Administration
Emmanuel College	<ul style="list-style-type: none"> • Principal
Emily Carr University of Art and Design	<ul style="list-style-type: none"> • Vice-President, Finance

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President and Vice-Chancellor, Memorial University of Newfoundland

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Organization	Position (Presidential and Vice-Presidential)
Fleming College	<ul style="list-style-type: none">• Associate Vice-President, Student Experience
Georgian College	<ul style="list-style-type: none">• Vice President, Academic• Vice-President, Student Success
Humber College	<ul style="list-style-type: none">• President and CEO• Senior Dean, FSCS, and Principal, Lakeshore Campus
King's University College	<ul style="list-style-type: none">• Principal• Vice-Principal and Academic Dean
Knox College	<ul style="list-style-type: none">• Principal
Lakehead University	<ul style="list-style-type: none">• Provost and Vice-President, Academic• Associate Vice-President, Human Resources• President and Vice-Chancellor
Laurentian University	<ul style="list-style-type: none">• Provost and Vice-President, Academic• Vice-President, Finance and Administration• Vice-President Research
Loyalist College	<ul style="list-style-type: none">• President and CEO
MacEwan University	<ul style="list-style-type: none">• President• Vice-President, University Relations• Provost & Vice President Academic• Associate Vice-President, Human Resources
Martin Luther University College	<ul style="list-style-type: none">• Principal-Dean
McMaster University	<ul style="list-style-type: none">• Vice-President (Operations & Finance)
Memorial University of Newfoundland	<ul style="list-style-type: none">• Vice President, Advancement and External Relations
Mount Allison University	<ul style="list-style-type: none">• President and Vice-Chancellor
Mount Royal University	<ul style="list-style-type: none">• Provost & Vice-President Academic
Mount Saint Vincent University	<ul style="list-style-type: none">• Associate Vice-President, Research
Northern College	<ul style="list-style-type: none">• President and CEO• Senior Vice-President, Academic

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President and Vice-Chancellor, Memorial University of Newfoundland

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Organization	Position (Presidential and Vice-Presidential)
NSCAD University	<ul style="list-style-type: none">• President
Ontario Tech University	<ul style="list-style-type: none">• President and Vice-Chancellor• Assistant Vice-President, Planning and Analysis
Saint Mary's University	<ul style="list-style-type: none">• Vice-President Academic and Research
Seneca College	<ul style="list-style-type: none">• Vice-President, Human Resources
St. Jerome's University	<ul style="list-style-type: none">• President and Vice Chancellor
St. Mary's University Calgary	<ul style="list-style-type: none">• President and Vice Chancellor• Vice-President, Academic
St. Thomas University	<ul style="list-style-type: none">• President and Vice-Chancellor• Vice President, Finance and Administration
Toronto Metropolitan University	<ul style="list-style-type: none">• Assistant Vice-President, Business Development and Strategic Initiatives
University of Alberta	<ul style="list-style-type: none">• Vice-President (Finance and Administration)• Vice-President (External Relations)
University of Guelph	<ul style="list-style-type: none">• Vice-President, Finance and Operations• Vice-President (Research)
University of New Brunswick	<ul style="list-style-type: none">• Vice-President, UNB Saint John• Associate Vice President, Capital Planning and Operations• Associate Vice President, Human Resources
University of Prince Edward Island	<ul style="list-style-type: none">• Vice-President, Academic & Research
University of Toronto	<ul style="list-style-type: none">• Vice-Principal, Research and Innovation
University of Windsor	<ul style="list-style-type: none">• Vice-President, EDI• Associate Vice- President, Student Experience
Vancouver Island University	<ul style="list-style-type: none">• Associate Vice President, International Education
Wilfrid Laurier University	<ul style="list-style-type: none">• Provost and Vice-President: Academic• Vice-President: Research• Vice-President: Student Affairs• Assistant Vice-President: Financial Resources

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President and Vice-Chancellor, Memorial University of Newfoundland

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Organization	Position (Presidential and Vice-Presidential)
York University	<ul style="list-style-type: none">• Vice-President, Finance and Administration• Associate Vice-President, Faculty Affairs
Yukon University	<ul style="list-style-type: none">• Vice-President, Finance and Administration

Decanal Searches

Organization	Position (Decanal)
Algoma University	<ul style="list-style-type: none">• Dean, Faculty of Sciences• Dean, School of Business and Economics• Dean, Faculty of Humanities and Social Sciences
Brock University	<ul style="list-style-type: none">• Dean, Faculty of Education• Dean, Faculty of Mathematics and Science• Dean, Unama'ki College
Cape Breton University	<ul style="list-style-type: none">• Dean of Nursing• Dean of Business• Dean, School of Education and Health
Concordia University	<ul style="list-style-type: none">• Dean, School of Health• Director, School of Nursing and Assistant Dean, Faculty of Health Professions
Dalhousie University	<ul style="list-style-type: none">• Faculty of Medicine: Associate Dean, Research• Director of the School of Nursing and Assistant Dean, Research, Faculty of Health
Fanshawe College	<ul style="list-style-type: none">• Dean, Faculty of Health, Community Studies and Public Safety• Dean, Creative Industries
Fleming College	<ul style="list-style-type: none">• Dean, Haliburton School of Art + Design
George Brown College	<ul style="list-style-type: none">• Dean, Centre for Business• Dean of Applied Technology
Humber College	<ul style="list-style-type: none">• Senior Dean, Liberal Education and Flexible Learning• Dean of Students• Associate Dean, Journalists and Writers• Dean of Education• Dean of Business
Lakehead University	<ul style="list-style-type: none">• Dean, Engineering• Dean of Health and Behavioural Sciences• Dean, Natural Resources Management

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Organization	Position (Decanal)
Lambton College	<ul style="list-style-type: none">• Dean of Academic Excellence and Teaching Innovation• Dean, Fire Science, Health and Community Services
Laurentian University	<ul style="list-style-type: none">• Dean, Faculty of Management
Loyalist College	<ul style="list-style-type: none">• Dean, School of Applied Science• Dean of Leadership, Learning and Academic Excellence• Associate Dean, Applied Science, Skilled Trades and Technology
MacEwan University	<ul style="list-style-type: none">• Dean, Arts and Science• Dean, Faculty of Nursing
McGill University	<ul style="list-style-type: none">• Dean of the School of Continuing Studies
McMaster University	<ul style="list-style-type: none">• Dean, DeGroote School of Business
Mount Allison University	<ul style="list-style-type: none">• Dean of Arts• Dean of Science
Mount Royal University	<ul style="list-style-type: none">• Dean, Faculty of Arts• Dean, Continuing Education & Extension
Mount Saint Vincent University	<ul style="list-style-type: none">• Dean, Professional Studies and Graduate Studies
NSCAD University	<ul style="list-style-type: none">• Dean
Ontario Tech University	<ul style="list-style-type: none">• Dean, Social Sciences and Humanities• Dean, Faculty of Health Sciences• Dean, School of Graduate and Post - Doctoral Studies• Dean, Faculty of Business and Information Technology
Saint Mary's University	<ul style="list-style-type: none">• Dean, Faculty of Graduate Studies and Research
Sheridan College	<ul style="list-style-type: none">• Dean, Pilon School of Business• Dean, Faculty of Animation, Arts and Design• Dean, Faculty of Humanities and Social Sciences
St. Mary's University Calgary	<ul style="list-style-type: none">• Dean, Education• Dean, Arts & Sciences
Trinity Western University	<ul style="list-style-type: none">• Dean, Faculty of Natural and Applied Sciences
University of Guelph	<ul style="list-style-type: none">• Dean of The College of Biological Science

Executive Search Proposal

President and Vice-Chancellor, Memorial University of Newfoundland

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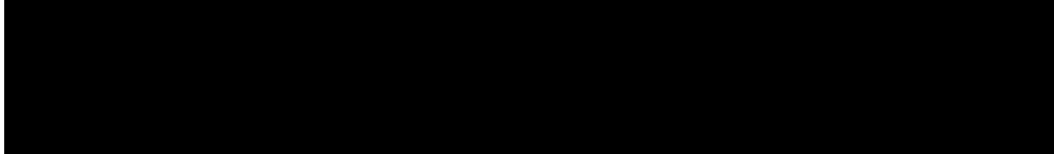
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Organization	Position (Decanal)
University of Manitoba	<ul style="list-style-type: none">• Dean, Faculty of Education• Dean, Faculty of Science• Dean of Arts (UNB Saint John)• Dean of Nursing
University of New Brunswick	<ul style="list-style-type: none">• Dean of Education• Dean of the Faculty of Business (Saint John)• Dean, Faculty of Science• Dean, Renaissance College• Dean, Faculty of Law
University of Prince Edward Island	<ul style="list-style-type: none">• Dean, Faculty of Nursing• Dean, Atlantic Veterinary College
University of the Fraser Valley	<ul style="list-style-type: none">• Dean, College of Arts• Dean, Faculty of Education, Community, and Human Development
University of Toronto	<ul style="list-style-type: none">• Dean, Faculty of Kinesiology and Physical Education• Assistant Dean, EDI, Faculty of Law• Assistant Dean, EDI, Daniels Faculty of Architecture and Design
University of Windsor	<ul style="list-style-type: none">• Dean, Odette School of Business• Dean, Faculty of Nursing
Vancouver Island University	<ul style="list-style-type: none">• Dean, Faculty of Science and Technology
Wilfrid Laurier University	<ul style="list-style-type: none">• Dean of Science• Dean of Education• Dean of Students• Dean of Music• Dean, Human and Social Sciences• Dean, Faculty of Graduate and Postgraduate Studies
York University	<ul style="list-style-type: none">• Associate Dean, Teaching & Learning

Appendix F: References

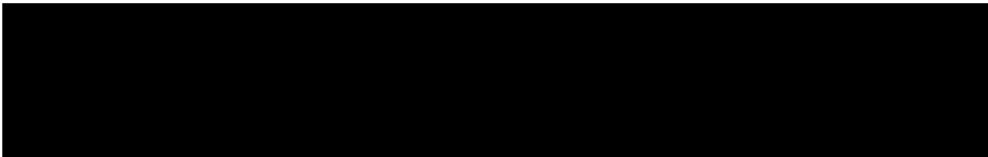
We invite you to contact any of our clients to learn about their experience in working with our firm. For your convenience, listed below are several clients who can attest to their experiences working with Jennie Massey's team at KBRS on searches for key leadership roles:

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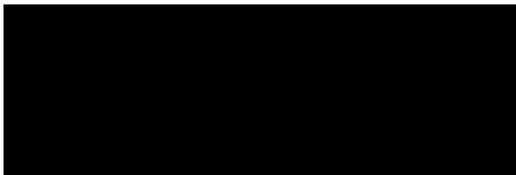
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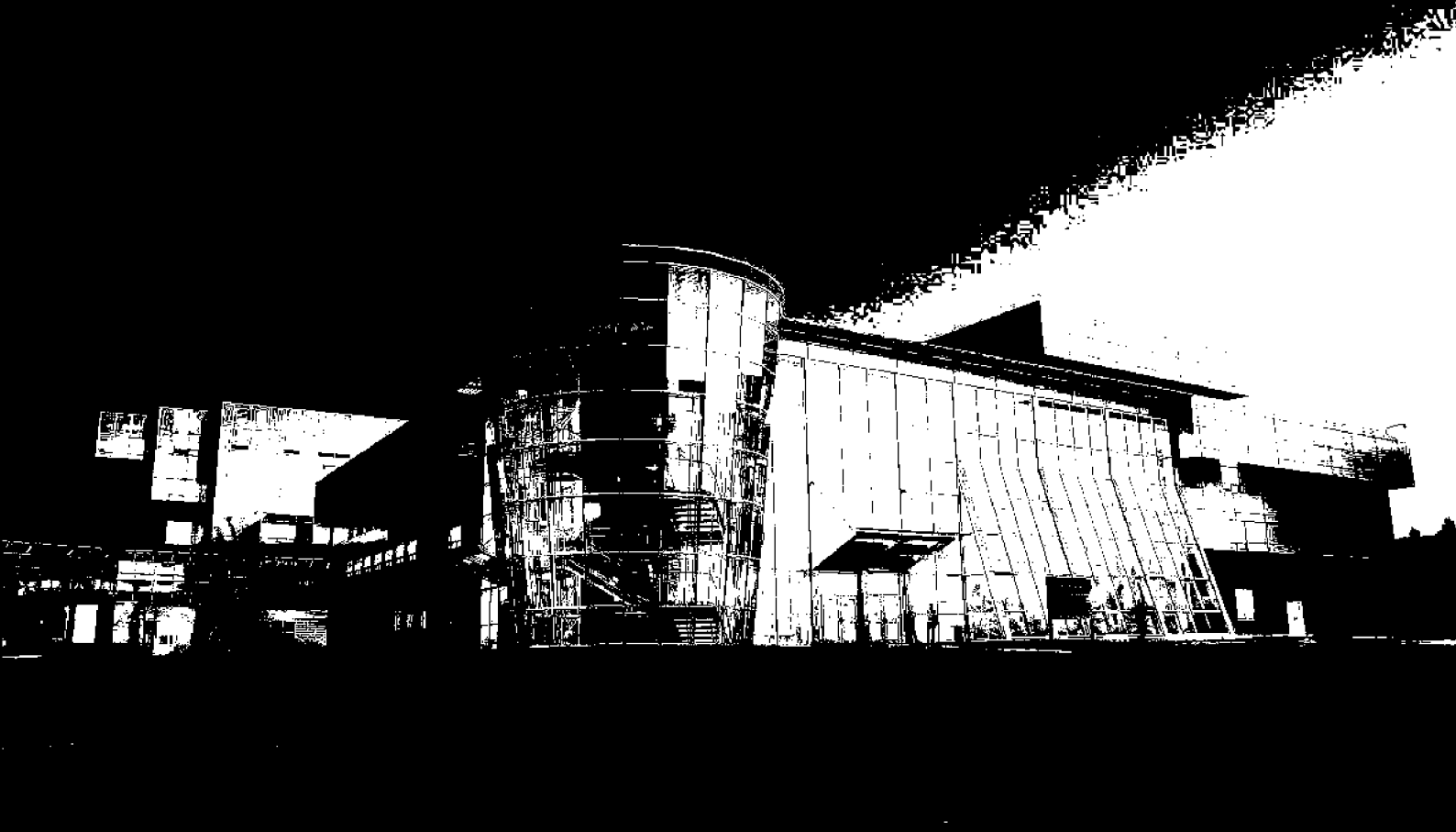


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Memorial University of Newfoundland

Appointment of the President & Vice-Chancellor
RFP-015-24

Proposal –May 2024



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Introductory Remarks

Perrett Laver respectfully acknowledges our presence on the unceded territories of the x^wməθk^wəyəm (Musqueam), Skwxwú7mesh Úxwumixw (Squamish) and səli lw ətaʔt (Tseil-Waututh) peoples in Vancouver and the Huron-Wendat, Seneca, and Mississaugas of the Credit in Toronto. We also respectfully acknowledge that lands on which Memorial University's campuses are situated are in the traditional territories of the Beothuk, Mi'kmaq, Innu, and Inuit of the province.

Perrett Laver is delighted to submit this proposal in response to Memorial University of Newfoundland (MUN) and the search for its next President & Vice-Chancellor. We are confident that our deep knowledge of the Canadian and global higher education, our unique research methodology, and our distinctive global and fully integrated corporate structure mean that we are well-placed to bring forward a unique and diverse candidate field for this critical appointment.

Perrett Laver's mission is to find outstanding leaders and researchers for organizations that are solving the world's biggest challenges and having a positive impact on society. We have worked extensively at the nexus point between research, innovation, and education and we are one of the global market leaders for research and academic leadership appointments. Perrett Laver would not only bring to this search a deep knowledge of Atlantic Canada and Canadian post-secondary education generally, but also a truly global reach and proven ability to engage directly with academic, research, and innovation leaders around the world. From our 17 global offices, we work in close collaboration to serve clients in over 70 countries. This spectrum of clients includes half of the top 200 universities in the world.

University President searches are inherently high-profile and high-pressure assignments. As a firm, we have placed over 350 university Presidents (or equivalent) at higher education institutions around the world, including 18 of the current university Presidents of top 50 global universities – and over a dozen in Canada. Our experience in Canada includes 15 university Presidents, nine of which are U15 Presidents: Dalhousie, McGill, UBC, Waterloo, Queen's, Manitoba, Saskatchewan, Alberta, and currently Toronto – outside the U15 at UVic, Carleton, Brandon, NSCAD, Brock, and very recently UPEI. We include further detail below, but a brief spectrum of global President-level appointments includes Oxford, Cambridge, Imperial College, University College London, EPFL, Luxembourg, Nanyang, Chinese University of Hong Kong, Melbourne, Sydney, Auckland, and many others. We work with the majority of the Global top 10 universities and half of the Global top 200, and we are the only firm that has advised upon global top 40 university Presidencies on four continents: North America, Europe, Asia, and Australia.

We hold the principles of equity, diversity and inclusiveness, anti-racism, and Indigenization at the heart of every aspect of our search activities. These principles are in play from the initial briefing meetings with the committee, through consultations with stakeholder groups, candidate generation stages, and to the final negotiations and onboarding with the preferred candidate. We are proactive throughout in promoting inclusivity in the search materials (advertisements and appointment details), engaging with and advocating for candidates from all equity-deserving groups, and ensuring that candidates' needs are supported at all stages with respect to access and process equity.

Our process will identify the most promising candidates wherever they are located because of our unique set of existing Canadian and international networks, as well as our unique approach to conducting entirely new candidate research on every assignment to build upon our existing networks. We do not take our networks for granted and we treat every assignment with fresh eyes.

We share here detail on our extensive experience in executive level academic recruitment; in our focus on diversity and inclusion; our expertise in facilitating robust community consultation to support the University community in identifying the capacity and qualities of its next President, as well as detail on our firm, proposed project team, methodology, fees and service guarantees. We would be deeply honoured to work with you on this most important search and we thank you for your consideration.

Signed



s. 40 (1)

Gordon Lobay, PhD
Regional Managing Partner, Americas
17th May 2024
For Perrett Laver

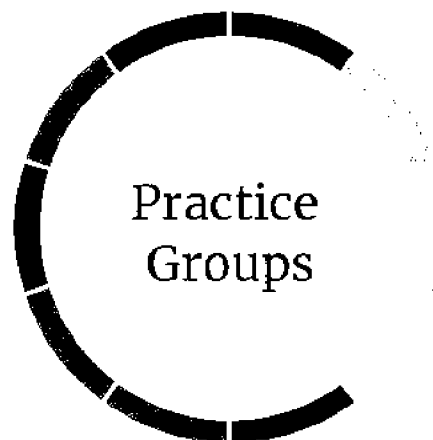


About Perrett Laver

Perrett Laver is a top 3 global search firm focused on 'mission-driven' sectors and themes; and is ranked in the top 30 of all search firms worldwide. We advise educational, research, healthcare, philanthropic, non-profit and cultural organizations in world-class appointments. We have a deep passion for the outcomes and impact that our sectors deliver in society, with strong internal commitments to diversity, mental health, social mobility, education and justice.

We work for organizations in over 70 countries worldwide, across every time zone and through our international team.

We hold the principles of equity, diversity and inclusion at the heart of every aspect of our search activities. These principles are in play from the initial briefing meetings with the committee, through the candidate generation stages, to the final negotiations and onboarding with the preferred candidate. We are proactive throughout in promoting inclusivity in the search materials, engaging with and advocating for candidates from all equity-seeking groups, and ensuring that candidates' needs are supported at all stages with respect to access and process equity.



- Climate, Environment & Conservation
- Social Impact
- Arts & Culture
- Sport
- Higher Education
- Research, Technology & Innovation
- Schools & Educational Organisations
- Government
- Health
- Board

Who We Are

Perrett Laver is led by the Managing Partners and Practice Heads. Together with the global Partnership and Consulting team, they lead the various practices within the firm and are supported by specialist researchers and project managers. The firm comprises c. 200 colleagues globally.

s. 40 (1)

The Advisory Board is chaired by Professor Dame Alison Richard, [REDACTED] Alongside Alison sits Professor Bertil Andersson, [REDACTED] and Professor Glyn Davis, Chief Executive of the Paul Ramsay Foundation, [REDACTED]

s. 40 (1)


Ranked
top 3
of all search firms
focused on mission driven
sectors worldwide


Employee
owned


We have clients based in
70 countries


600
searches annually

Global Higher Education Practice

s. 40 (1)

Perrett Laver is a leading international firm serving the Higher Education (post-secondary education) sector. Our clients include 53 of the top 100 universities in the world, We have assisted in the appointment of Presidents for 23 of the current top 50. Within higher education we advise on circa 400 leadership appointments per year, worldwide. Last year 56% of our appointees were women. Perrett Laver has advised on over 350 university President/Vice-Chancellor searches globally including 18 of the 24 current Presidents of Russell Group universities in the UK (including [REDACTED] as the first non-British Vice-Chancellor of Cambridge and Louise Richardson as the first ever female Vice-Chancellor of Oxford); six recent Presidents of Group of 8 universities in Australia (Monash, UNSW, Adelaide, Melbourne, Queensland, and Sydney); four in New Zealand (Auckland, Otago, Lincoln, and VU Wellington); in Continental Europe, Presidents at Ecole Polytechnique Fédérale de Lausanne (EPFL) in Switzerland, the Rector of the University of Luxemburg, and several universities in Asia including the Chinese University of Hong Kong, Nanyang Technological University, and Hong Kong University. Our Canadian experience at the university President level is listed below.

Perrett Laver has worked extensively with specialist higher education institutions around the world including funding councils, learned societies, policy organizations, and other leading organizations within the sector, to posts where higher education and educational agendas more broadly meet wider government policy and priorities, giving us a genuine breadth of experience and understanding of the wider strategic issues within and across the sector.

Canadian Post-Secondary Education

Perrett Laver has been active in Canada since 2013 and has offices in Vancouver, Toronto and Montreal. We have led searches for numerous senior academic and administrative positions in post-secondary education institutions of all kinds across U-15, comprehensive and teaching-led institutions. Since 2013 we have led 14 university President searches in Canada including eight U15 Presidencies (Dalhousie – Kim Brooks; McGill – Deep Saini; UBC – Santa Ono; Waterloo – Vivek Goel; Queen’s – Patrick Deane; Manitoba – Michael Benarroch; Saskatchewan – Peter Stoicheff; Alberta – David Turpin; and, currently Toronto). Outside the U15 we led the recent president searches at Victoria (Kevin Hall), Carleton (Benoit-Antoine Bacon), Brandon (David Docherty), NSCAD (Peggy Shannon), Brock (Lesley Rigg), and very recently at UPEI (Wendy Rodgers).

We have led searches for Vice-Presidents of Research (or equivalent) at SFU, Queen’s, Alberta, Concordia, (currently) at University of Toronto, Mississauga, and the AVPR at UVic. We have also led Provost searches at Alberta, UVic, both UBC Vancouver and UBC Okanagan, Saskatchewan, Western, Brandon, and Concordia – along with numerous other Vice-President, Dean-level, University Librarians, Centre/Institute Director positions, Heads of Departments and a large volume of faculty-level searches across the country including endowed Research Chairs, Canada Research Chairs, Canada Excellence Research Chairs, cluster hires, dedicated equity-deserving faculty searches, and many others. We also work on a wide range of professional service roles across higher education institutions including finance, student services, human resources, technology, security, facilities and operations, etc.

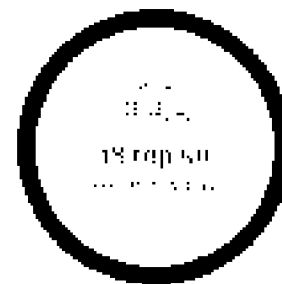
Global Reach

Perrett Laver has an extensive track record of delivering exceptional, diverse, and international fields of candidates for senior appointments in universities around the world. Our knowledge of the Canadian post-secondary education system, and our global experience and networks can assure you that we will identify the most promising candidates wherever they are presently located. As a firm, we operate in a non-territorial model, meaning we work in a truly collaborative way across our global offices, sharing and utilizing relevant networks and contacts in each region, whilst maintaining integrity and consistency in terms of the delivery teams relationship with our clients and candidate interaction.

As demonstrated in our track record, Perrett Laver has extensive experience at senior level executive search within Canadian post-secondary education and across the global higher education market. We have deep networks within Canadian post-secondary education and unparalleled networks within the Canadian diaspora globally in higher education. MUN will undoubtedly be seeking not only the best candidates in Canada, but those from around the world (including in the Canadian diaspora globally) and in this regard Perrett Laver is best placed to deliver high-calibre, diverse, and truly unique candidate field.

Our Presidential Search Experience

Perrett Laver's Higher Education practice advises on over 600 leadership searches globally, each year, and has advised on over 350 **President/Vice-Chancellor**/institution leader searches worldwide. This includes 18 of the current Presidents of top 50 global universities. With a focus on our work for research universities, we have advised on the appointments of:



- **15 University Presidents, 9 of which are the U15 Presidents, in Canada** including UBC, McGill, Waterloo, Queen's, Manitoba, Saskatchewan, Alberta, Dalhousie and currently University of Toronto – outside the U15 at UVic, Carleton, Brandon, NSCAD, Brock, UPEI;
- **All Vice-Chancellors for UK universities ranked in the top 100**, including 19 of the 24 current Presidents of Russell Group universities in the UK (including former UBC President Stephen Toope as the first non-British Vice-Chancellor of Cambridge and Louise Richardson as the first ever female Vice-Chancellor of Oxford), 31 Russell Group searches in total;
- Numerous Presidents and Rectors across Continental Europe, but of particular note are **ETH, EPFL, Leiden, Utrecht, Aalto, Luxembourg**;
- Presidents for **KAUST, American University in Cairo, NYU Abu Dhabi and NEOM** in the Middle East;
- **4 of the 5 top-ranked Hong Kong** universities, including The University of Hong Kong, The Chinese University of Hong Kong, the Hong Kong Polytechnic University and, currently, HKUST;
- **Nanyang Technological University** in Singapore;
- all **7 recent President searches in Ireland**, including Trinity College Dublin;
- **6 of the current Group of 8 Vice-Chancellors in Australia**, including Melbourne, Sydney, UNSW, Monash and Queensland;
- **5 current Vice-Chancellors** in New Zealand, including Auckland, Otago (twice), VU Wellington and Lincoln;
- Key strategic leaders at **19 of the top 100 US universities**;

Our completion rate for Vice-Chancellor and President appointments remains 100%.

When we reflect on our experience and record of Vice-Chancellor appointments, we hope that our approach to candidate engagement has been material in helping clients succeed. We are passionate that the very best processes must be candidate centred throughout; and that the most potent advocacy is predicated upon truthfulness: after all the very best candidates are most engaged by understanding the greatest challenges ahead.

We are confident that we can represent MUN effectively and engage effectively outstanding and diverse candidates on your behalf. We demonstrate professionalism, honesty, and integrity in the delivery of our search services, which is key to our success.

Approaching the search for next President of Memorial University (MUN)

It is easy to consider the many 'headwinds' that face universities in the current global context. However, in the next 20 –50 years the world's leading economies will predicate themselves upon innovative pedagogy and discovery research and translation with social and economic impact. Within this context, the importance of MUN to both Atlantic Canada and Canada cannot be emphasized enough. MUN already possesses key focal areas on student wellbeing, access, EDI, Indigenous, educational quality, in-person vs online program offerings, inclusion and Indigenous – augmented by increasing enrolment of students and employability of graduates. How MUN is able to position itself as a magnet for the very best people will require significant leadership across the university, but undoubtedly from the President.

Despite this search coming at a time of significant disruption (internally, leadership changes at MUN and a lecturers' union strike, as well as COVID-19, energy prices, interest rate hikes and inflation, war, and many other external factors), this appointment is very exciting and will be highly attractive to world-class candidates.

The successful President will lead an inclusive, forward-thinking university with an excellent and growing reputation academically, increasing research intensity and impact (and a real opportunity to build on that success), and focus on equity, diversity and inclusion, anti-racism, and Indigenization. Another critically important factor is geographical location. It is not enough for the next President to align with the values of the University, they will also need to be motivated by the opportunity to live and work in St. John's and be interested in the opportunities for engagement in the city and more widely across Newfoundland and Labrador, and Atlantic Canada. They will need to be comfortable communicating effectively and compellingly with the highest levels in government, business and industry, and society – yet also inclusive and approachable and able to advocate for the University and the post-secondary education sector to the general public. MUN cannot be an ivory tower, it is inherently a key part of the fabric of Newfoundland and Labrador and must engage accordingly.

Through our recent university President searches we have had recent contact with a significant proportion of senior leaders within Canadian post-secondary education and in global higher education institutions (we share in this proposal a range of 'select' searches that outline our track record). Through our deep international networks of world-leading talent we have developed relationships with outstanding and diverse international academic leaders and the Canadian diaspora in the global higher education sector, which we would also bring to bear in this search. Our process will identify the most promising candidates wherever they are located because of our unique set of existing Canadian and international knowledge and networks, as well as our non-territorial and collaborative approach, and unique emphasis on conducting entirely new candidate research on every assignment to build upon our existing networks.

As a result of this experience, we have developed a deep understanding of post-secondary education globally and the challenges facing university presidents in their unique contexts. We would offer not just the requisite and current networks to access excellent individuals from a range of relevant organizations, but also a sensitivity to the vision and values that potential candidates will need to demonstrate in order to succeed as MUN's next President, whatever their background and experience. This depth of sectoral knowledge, along with our values-set as a firm, help us act as compelling advocates for our clients at all levels. We enjoy building highly transparent and effective partnerships with our clients and their key stakeholders throughout our processes, and on an ongoing basis. Due to this approach our advocacy to potential candidates will be honest, knowledgeable and compelling.

MUN has recently experienced some considerable leadership challenges and very recently also a strike of lecturers. In times of great transition such as this, it is critical that your executive search partner does not make too many assumptions about the search for a new President before engaging with stakeholders. Perrett Laver has deep experience and a highly successful track record in leading university President searches during challenging times. For instance, we led UPEI's recent presidential search in the aftermath of the revelations of the Rubin Thomlinson's report, appointing Wendy Rodgers from UNBC. We led NSCAD's most recent President search following the sudden departure of Aoife Mac Namara, appointing Peggy Shannon from San Diego State University. We led UBC's President search following the unexpected departure of Arvind Gupta wherein we appointed Santa Ono from the University of Cincinnati. We conducted the latest President search for the University of Saskatchewan immediately following their former President's termination (and Provost stepping down) – our appointment was an outstanding internal candidate in Peter Stoicheff. Internationally, we have

Conducted President searches for the London School of Economics and Political Science (LSE) after the Director (President equivalent) resigned following their deeply controversial decision to award a doctoral degree to a family member of the former regime in Libya, and for the Universities of Durham and Aberystwyth following the termination of their respective former Vice-Chancellors (President equivalents).

Under the right leadership, MUN is well-positioned to address current challenges and enhance its strengths. MUN has a rich history, ambitious future plans, and local community support – and because of this the University is ready to make a substantial and bold impact in its next stage of evolution. MUN is at an exciting point in its impressive history as it continues to build on its strengths in education and research. Against this stimulating backdrop, we have little doubt that the Presidency will present as an exceptional opportunity for a diverse range of high-calibre candidates from across Canada and globally.

Critical considerations in the search for the next President of MUN

Trends and key factors affecting senior administrative hiring in academia – There are many trends impacting senior hiring in academia including, rightly, a more intense focus on equity, diversity, and inclusion (EDI), anti-racism and Indigenization; but within this are debates and challenges surrounding academic freedom, freedom of speech and the place of universities within society to protect the necessary freedoms essential to a democracy. While Covid-19 is hopefully fully behind us, the current high interest rate, high inflation, and global destabilization are currently creating fatigue in potential candidate pools, as well as continuing to influence their decisions to make moves under such challenging conditions. Other recent factors include energy prices, global food insecurity, rises in inflation and interest rates, war and destabilized global geo-politics. Other issues:

- The president is individually held up more and more as the personification of the values and ideals of the institution: in the face of unpredictable, rapidly changing, and often threatening challenges from all possible angles and perspectives on all manner of issues and interests. Trust in public institutions cannot be assumed, and the president of any university will be tested repeatedly for the values they espouse and their shaping of the tone, message and values of the university.
- The president must be effective in working with collaborators from industry, government, Indigenous communities, and the civil/social sector. Universities can no longer operate in isolation and funders are seeking to invest in 'multi-partner' platforms that are larger than any one institution, yielding social, academic and economic dividends.
- The emergence of digital innovations within global higher education, in the U.S. most significantly, that are starting to 'disrupt' models for education and research within universities across Canada and globally – MUN's direct competitors. The pace of change is fast, and Canada is considerably behind the curve. Given that digital innovation will require huge cultural and organizational change, and huge financial investment, it is likely that this area will become ever more prominent.
- The requirement of the president to guide institutions through the challenges noted above. We see the conundrum that Boards are often 'risk averse' and want a leader with experience in handling crises, the 'safe pair of hands' analogy; however, the global context has changed and will continue to do so. Contemporary leadership with new perspectives may be needed to embrace new and future opportunities.

EDI, accessibility, Indigenization, and anti-racism in search processes – including client & candidate support

EDI principles are in play from the initial briefing meetings with the Committee, through the candidate generation stages, to the final negotiations with the preferred candidates. We are proactive throughout in promoting inclusivity in the search materials, engaging with and advocating for candidates from all equity-deserving groups, and ensuring that candidates' needs are supported at all stages with respect to access and process equity. Perrett Laver prides itself on an iterative and thorough approach to identifying candidates, which ensures our 'candidate generation' is based upon measurable criteria. We proactively:

- Source high-level equity-deserving academic leaders and leaders from equity-deserving groups, specifically with the aim of discussing this matter and receiving recommendations they have;
- Identify candidates through thorough desk research. Within the confines of the selection criteria, there is a good deal of objectivity to our candidate identification, which means both that suitably qualified individuals will not be missed, and that 'threshold' candidates can be purposefully included. We review the candidate field regularly to ensure it is diverse across federally protected groups and beyond.

- Advocate on behalf of the University and highlight to potential candidates the University's enthusiasm to appoint, and ability to support an equity-deserving candidate;
- Support candidates with a-typical or slower career progression, career breaks, etc;
- Encourage committees to challenge directly any unconscious biases or processes that arise wittingly or unwittingly during the course of the search.

Consultation

At the start of the process, we would ideally want to engage with the Search Committee and speak with key stakeholders in the appointment. This stage is an integral part of both refining the selection criteria and informing how we approach candidate identification and engagement. We feel strongly that success is founded upon the initial consultation period with our clients. We would seek to engage with the following (not limited to) where applicable: Chair of the Board and Board of Governors, administrators and staff; faculty members across the University; other senior leaders as well as direct and indirect reports such as the senior team in the President's office; students; post-docs; unions; and the out-going President. We would also hope to have the chance to consult with external friends and partners of MUN. We generally hold these engagements through a combination of one-on-one and small group meetings, as well as larger open for a – and through a mix of online and in-person settings. Our consultations seek to both reflect reality back to our client, as well as challenge preconceptions, and through these we would attend particularly to the likely 'selling points' and 'sticking points' of the position.

Plan of Execution & Approach

Any senior leadership or highly specialized search requires a considerable number of resources and attention to detail. We offer professional, experienced advice throughout the process, supporting you to overcome the unique challenges that come with each search. We are strongly of the opinion that we are there to support the Chair, Panel and indeed Council in the discharge of their duties and therefore ensure that we remain always serving their will and intent. The Lead Partner (alongside the Consulting team from Perrett Laver) will take full responsibility for the search and will always give the best advice as to what approach should be considered.

We outlined the core elements of the services offered in the detailed “Methodology” section below. There are also several aspects of the service that we offer that we should like to highlight, some of which are options for the Panel to consider and from which any number may be chosen.

Partnership Approach

Expanding upon the above point, fundamental to our work is the belief that we are to support the organizations with whom we work. Importantly we are expert at exponentially increasing their likelihood for a successful process. We do this through:

- collaborative working;
- much experience of panel-based decision making;
- spirit of shared working and transparency;
- provision of robust advice that will inform and improve where institutions are not recruiting as they might hope or wish;
- an ability to bring forward more diverse, and higher quality candidate fields on a consistent basis for our clients;
- full responsibility for a complex, detailed and attentive administration of the process;
- a desire to make the process as rich an enjoyable as possible for all.

Client and Candidate Communications

The very best searches are founded on excellent communications. This is both between search firm and client, and search firm and candidates. The lead Partners ensure that there is constant availability of individuals at Perrett Laver for update calls (which we would recommend to schedule regularly throughout) to ensure that progress is tracked, accountable and checked along the way. Our long experience of candidate handling, often through having got things wrong as much as having got them right in the past, has led us to a set of commitments around communications to candidates that are best practice in our sector and that seek ultimately to ensure that every candidate who leaves the process unsuccessful is as positive about the university as the individual ultimately appointed to the role.

Advertising and Social Media

Our guiding principle regarding advertising is that it is important to be clear on the purpose of any advert and the expected outcome. In our experience, strong candidates will be identified and engaged through the proactive and targeted search rather than through the advertisement. Advertising can however add value in terms publicity, diversity, and transparency. We offer full support in this aspect and our service here also seeks to ensure that there is no unnecessary spend on expensive publications without a confident return in terms of either publicity or candidate applications.

We will work with your Communications department to develop a social media strategy, including advertising to Perrett Laver’s own LinkedIn and X (Twitter) social media accounts and encouraging the University to circulate those posts within their networks. This is an excellent opportunity to use the media to promote the University’s ambition for the next phase in its development.

Partner-Led Tailored and Targeted Approaches

There needs to be discussion on the co-ordination of the courting approach for key targeted individuals. It is important to state that the majority of first approaches to targeted candidates will be conducted personally by the lead consultant and the project team. Some approaches will be more effective through a joint effort, or (if appropriate) with the targeted involvement of the Chair as an advocate. A third-party relationship established by Perrett Laver is always crucial in securing the trust of the best candidates.

Excellent Handling of Internal Candidates

It is, of course, possible that any appointment will attract the attention of individuals within the University itself. We would wish to note that we welcome any such internal applicants and would ensure that they are treated in exactly the same manner as the external candidates and are assessed against the same criteria but with additional support in terms of coaching on the methods for framing their approach afresh for an audience they know well. This form of approach ensures fairness and transparency. It also means that should an internal candidate be appointed, then they shall have competed against a strong external field and therefore objectively been judged the best candidate.

Gathering Due Diligence

Due diligence is an essential part of any executive search process. It is a shared responsibility between the client and executive search firm, and there are governing principles that should be respected. Integral to our processes are a range of methods by which we gather information about candidates. This includes informal recommendations and testimony, social media screening, and formal oral and written references. Strategies that are implemented include:

- **Social Media and Online Presence:** We review the candidate's social media profiles, online presence, and professional networking platforms to gather additional insights into their background, qualifications, and professional reputation. We exercise caution to avoid any discriminatory or invasive practices.
- **Public Records Searches:** We search public records databases for information relevant to the candidate, such as civil litigation history, bankruptcy filings, property ownership, and regulatory actions.
- **Document and Maintain Records:** We document the results of background checks and due diligence activities, including any findings, discrepancies, or red flags identified. We maintain accurate and secure records in accordance with privacy and data protection requirements.
- **Professional Background Screening Services:** If clients prefer, we have extensive experience engaging reputable third-party background screening companies to conduct comprehensive background checks on behalf of our clients. These companies have access to extensive databases and expertise in conducting thorough investigations while ensuring compliance with relevant regulations.

Ultimately the client is liable for their decision, and we strongly advise clients to decide which at times may extend to include third party referencing agencies.

Risk Mitigation & Contingencies

Confidentiality

Ensuring confidentiality is a critical aspect of any risk mitigation strategy, which is critical to an executive search process to ensure the integrity of the search, protect the reputation of hiring organization and candidates, and prevent any potential disruptions in the current employment situations of the candidates. We are always keen to discuss ways to heighten our confidentiality protocols, but here are the steps most commonly taken:

- **Limiting Access:** Restrict access to information related to the search process to only those directly involved. This usually include creating a small, dedicated team within the hiring organization (namely the search committee) and sharing all information directly with the committee exclusively throughout the search process.
- **Confidentiality Protocols:** We implement strict protocols for handling sensitive information, password protecting candidate documentation and limiting the distribution of documents to candidates. We additionally work directly with committees at meetings to ensure meeting deliberations are confidential and no record of committee deliberations are available for circulation.
- **Controlled Communication:** As your trusted search firm partner, we centralize communication channels to ensure that all interactions with candidates are managed carefully and that no information is inadvertently disclosed.
- **Clear Communication:** Clearly communicate the importance of confidentiality to all parties involved and emphasize the consequences of breaches. This is done not only at the outset of the process, but iteratively throughout to discourage committee members from seeking outside assessments of perspectives what can undermine in the integrity of the search.
- **Candidate Privacy:** Respect the privacy of candidates by refraining from contacting their current employers or disclosing their participation in the search without their explicit consent.
- **Regular Reviews:** Continuously review and update confidentiality measures to address any emerging risks or vulnerabilities throughout the search process.



Contingency Planning

A comprehensive contingency plan for an executive search recruitment process would typically include the following components:

- **Risk Identification:** Identify potential risks and uncertainties that could impact the recruitment process. These may include unexpected candidate withdrawals, key stakeholders becoming unavailable, changes in market conditions, or legal/regulatory issues.
- **Impact Assessment:** Evaluate the potential impact of each identified risk on the recruitment process, considering factors such as timeline, candidate quality, cost, and reputation.
- **Contingency Strategies:** Develop specific strategies to address each identified risk and minimize its impact on the recruitment process. These strategies may include alternative sourcing channels, backup interview schedules, communication plans for stakeholders, and legal contingency measures.
- **Resource Allocation:** Determine the resources (e.g., personnel, budget) needed to implement each contingency strategy effectively. Ensure that resources are readily available and allocated appropriately in case of activation.
- **Communication Plan:** Establish a communication plan to keep all stakeholders informed about the contingency measures in place and any changes to the recruitment process that may arise due to unforeseen circumstances. Ensure clear lines of communication internally within the recruitment team and externally with candidates, hiring managers, and other relevant parties.
- **Activation Criteria:** Define clear criteria or triggers that would indicate when to activate specific contingency measures. These criteria may be based on specific events, timelines, or risk thresholds.
- **Testing and Review:** Regularly test the contingency plan through scenario-based exercises or simulations to ensure its effectiveness and identify areas for improvement. Review and update the plan regularly to account for changes in the recruitment environment or organizational priorities.
- **Documentation:** Document all aspects of the contingency plan, including risk assessments, strategies, activation criteria, and communication protocols. Ensure that relevant stakeholders have access to this documentation and understand their roles and responsibilities in implementing the plan.

Consultation

Prior to finalizing a preferred approach, we would want to have a discussion with the search committee chair to ensure that we have a clear understanding of the current context, which can subsequently inform any sensitivity that may have been overlooked in the existing plan. Executive search consultations are typically robust. At an organization like the University of Iowa that plays such a central role in its sector and community, this is undoubtedly necessary.

Given the number of stakeholders involved, we would suggest, at the start of the process, a multi-channel (in-person & virtual) and multi-format approach (one-on-one, focus group, survey, town hall, etc.) to facilitate both maximal community engagement and the most robust and insightful feedback resulting from the consultation process. While the consultation plays an obvious role in shaping the eventual position description and selection criteria used in the search process, it can also be a useful community-engagement exercise to inform ongoing strategic planning efforts at the organization and act as a critical resource for new appointments.

Public Relations and Communications Strategies for Presidential Searches

Having conducted hundreds of presidential searches around the world, Perrett Laver has steered critical leadership searches under various constraints and varied circumstances ranging from very public presidential departures and resignations to navigating international jurisdictions facing inflationary crises. We led UBC's President search following the unexpected departure of Arvind Gupta wherein we appointed Santa Ono from the University of Cincinnati. Internationally, we have led President searches for the London School of Economics and Political Science (LSE) after the Director (President equivalent) resigned following their deeply controversial decision to award a doctoral degree to a family member of the former regime in Libya, and for the Universities of Durham and Aberystwyth following the termination of their respective former Vice-Chancellors (President equivalents). We also mentioned above our work in similar situations with UPEI, NSCAD and USask.

From a public relations standpoint, being sensitive to risk mitigation involves careful planning, communication strategies, and proactive management of potential challenges. Some strategies we proactively integrate into our search process or provide advisory support to clients on include:

Establishing Clear Communication Protocols: Develop clear communication protocols and guidelines for all stakeholders involved in the search process, including the search committee, board of trustees, university leadership, faculty, staff, students, alumni, and external partners. Ensure that all communications are consistent, transparent, and aligned with the institution's messaging strategy.

Expectation Management: Set realistic expectations with stakeholders regarding the timeline, process, and outcomes of the presidential search. Provide regular updates on the progress of the search, milestones achieved, and any changes to the timeline or process. Managing expectations helps mitigate uncertainty and reduces the risk of misinformation or speculation.

Maintain Confidentiality: Emphasize the importance of confidentiality throughout the search process to protect the privacy of candidates and the integrity of the search. Ensure protocols for sharing candidate materials, conducting interviews, and communicating with stakeholders minimize the risk of leaks or breaches of confidentiality.

Build Stakeholder Engagement: Foster meaningful engagement with key stakeholders throughout the search process. Provide opportunities for input, feedback, and participation in the selection process through town hall meetings, forums, surveys, and listening sessions. Engaging stakeholders builds trust, buy-in, and support for the eventual outcome of the search.

Address Contingency Planning: Anticipate potential risks, challenges, and contingencies that may arise during the search process, such as candidate withdrawals, external pressures, or unforeseen circumstances. Develop contingency plans and strategies for managing crises, conflicts, or disruptions to the search timeline.

Engage with Media Strategically: Proactively engage with the media to shape the narrative surrounding the presidential search process. Provide timely updates, respond to media inquiries promptly, and leverage media opportunities to convey key messages about the institution's priorities, values, and commitment to excellence in leadership.

Monitor and Manage Reputational Risks: Monitor media coverage, social media conversations, and stakeholder feedback to identify potential reputation risks or negative sentiment. Implement strategies for managing and mitigating reputation risks, including proactive communication, issue management, and crisis response protocols.

Evaluate and Adapt: Continuously evaluate the effectiveness of public relations strategies and tactics employed during the presidential search process. Gather feedback from stakeholders, assess media coverage and sentiment, and adjust communication strategies as needed to address emerging challenges or opportunities.

Track Record

Perrett Laver has advised on over 350 President/Vice-Chancellor/institution leader searches worldwide. This includes 18 of the current Presidents of top 50 global universities.

In brief, and with a focus on our work for research universities, we have assisted on the appointment of 15 university president searches in Canada, 9 U15s (Dalhousie, McGill, Waterloo, UBC, Queen's, Manitoba, Saskatchewan, Alberta and currently UofT) and 6 outside of that group (UVic, Carleton, Brandon, NSCAD, Brock, UPEI); all Vice-Chancellors for UK universities ranked in the top 100; 19 of the current Russell Group Vice-Chancellors (31 Russell Group searches in total); all 7 recent President searches in Ireland including TCD; 6 of the current Group of 8 Vice-Chancellors in Australia, including Melbourne, Sydney, Monash and Queensland; 5 current Vice-Chancellors in New Zealand including Auckland; numerous Presidents and Rectors across Continental Europe but of particular note are EPFL, Leiden, Utrecht, Aalto, Luxembourg; Presidents for KAUST, NYU Abu Dhabi and NEOM in the Middle East; in the US we work with 30 of the top 100 US universities; 4 of the 5 top-ranked Hong Kong universities including HKU and, currently, HKUST; NTU and SMU in Singapore.

Our completion rate for Vice-Chancellor and President appointments remains 100%; we have had 3 such searches in 20 years that required an extended process following a preferred candidate not accepting a role. We have had 2 institution leaders leave post within the first 3 years. When we reflect on our experience and record of Vice-Chancellor appointments, we hope that our approach to candidate engagement has been material in helping clients succeed. We are passionate that the very best processes must be candidate-centred throughout; that we should never pursue candidates out of vanity merely to flatter the client; and, that the most potent advocacy is predicated upon truthfulness: after all, the very best candidates are most engaged by understanding the greatest challenges ahead.

In the following pages we highlight our Canadian and 'select' global university president searches. All Canadian searches were led by Gordon Lobay and on most this same project team were involved. Gordon co-led searches at Otago, Lincoln, and VU Wellington and contributed to many of the other global searches listed herein.

We detail an 'indicative' track record of relevant appointments in the following pages.

Institution	Role	Appointee	Previous Role and Organisation
 UNIVERSITY OF TORONTO	Principal & Vice-Chancellor, 2024	Search ongoing (early stages)	
 UNIVERSITY of Prince Edward ISLAND	Principal & Vice-Chancellor, 2024	Professor Wendy Rodgers	Provost and Vice-President, Academic, University of Northern British Columbia
 DALHOUSIE UNIVERSITY	Principal & Vice-Chancellor, 2023	Professor Kim Brooks	Provost and Vice-President Academic (Acting), Dalhousie University
 McGill	Principal & Vice-Chancellor, 2022	Professor H. Deep Saini	President and Vice-Chancellor, Dalhousie University
 Brackley	President & Vice-Chancellor, 2022	Professor Lesley Rigg	Vice-President, Research, Western University
 NSCAD UNIVERSITY	President, 2021	Professor Peggy Shannon	Dean, Professional Studies and Fine Arts, San Diego State University
 UNIVERSITY OF WATERLOO	President & Vice-Chancellor, 2020	Professor Vivek Goel	Provost and Vice-President, Research, University of Toronto
 University of Victoria	President & Vice-Chancellor, 2020	Professor Kevin Hall	Vice-President and Senior Deputy Vice-Chancellor, Global Engagement and Partnerships, University of Newcastle
 University of Manitoba	President & Vice-Chancellor, 2019	Professor Michael Benarroch	Provost & Vice-President (Academic), Ryerson University (now Toronto Metropolitan University)
 Carleton UNIVERSITY	President & Vice-Chancellor, 2018	Professor Benoit-Antoine Bacon	Provost & Vice-Principal (Academic), Queen's University
 McMaster	Principal & Vice-Chancellor, 2018	Professor Patrick Deane	President and Vice-Chancellor, McMaster University
 BRANDON UNIVERSITY	President & Vice-Chancellor, 2018	Professor David Docherty	President and Vice-Chancellor, Mount Royal University
 UBC	President & Vice-Chancellor, 2016	Professor Santa Ono	President and Vice-Chancellor, University of Cincinnati
 UNIVERSITY OF SASKATCHEWAN	President & Vice-Chancellor, 2015	Professor Peter Stoicheff	Dean, College of Arts and Science, University of Saskatchewan
 UNIVERSITY OF ALBERTA	President & Vice-Chancellor, 2015	Professor David Turpin	President and Vice-Chancellor, University of Victoria

Global President/Vice-Chancellor Appointments (past 5 years)

Below is a select list of appointments we have supported on behalf of leading universities globally (from over 350).

Gordon co-led searches at **Otago, Lincoln, and VU Wellington** and contributed to many of the other global searches listed herein.

Institution	Country	Role and Name of Placed Candidate	Former Organisation of Placed Candidate
		Vice-Chancellor, Professor David Murdoch	Dean of the University of Otago, Christchurch
		Vice-Chancellor, Professor Dawn Freshwater	Vice-Chancellor, University of Western Australia
		Vice-Chancellor, Professor Irene Tracey	Warden, Merton College
		President, Professor Nancy Ip	Vice-President for Research and Development, HKUST
		Principal and Vice-Chancellor, Professor Peter Mathieson	Vice-Chancellor, University of Hong Kong
		President, Professor Xiang Zhang	Director, National Science Foundation Nano-scale Science and Engineering Center (SINAM)
		President, Professor Annetje Ottow	President, Universiteit Utrecht
		Vice-Chancellor, Professor Duncan Maskell	Senior Pro-Vice-Chancellor, University of Cambridge
		Vice-Chancellor, Professor Deborah Prentice	Provost, Princeton University
		President, Professor Lily Kong	Provost, Singapore Management University (also placed in this role by Perrett Laver)
		Vice-Chancellor and President, Professor Debbie Terry	Vice-Chancellor, Curtin University
		Principal, Professor Sally Mapstone	Pro-Vice-Chancellor for Education, University of Oxford
		Vice-Chancellor and Principal, Mark Scott	Secretary, New South Wales Department of Education
		President and Provost, Professor Michael Spence	President and Vice Chancellor, University of Sydney
			

Global President/Vice-Chancellor Appointments (past 5 years)


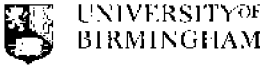





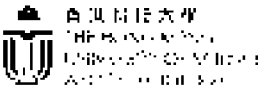


Institution	Country	Role and Name of Placed Candidate	Former Organisation of Placed Candidate
 The University of Nottingham <small>UNITED KINGDOM - CHINA - MALAYSIA</small>		Vice-Chancellor, Professor Shearer West	Deputy Vice-Chancellor, University of Sheffield
 JAMES COOK UNIVERSITY <small>THE HULL</small>		Vice Chancellor and President, Professor Simon Biggs	Senior Deputy Vice-Chancellor, University of Western Australia
		Vice-Chancellor and President, Professor Scott Bowman AO	Senior Deputy Vice-Chancellor, Western Sydney University
 香港中文大學 The Chinese University of Hong Kong		Vice-Chancellor, Professor Rocky Tuan	Director of the Center for Cellular and Molecular Engineering, Department of Orthopaedic Surgery, University of Pittsburgh
		Vice-Chancellor, Professor Harlene Hayne	Vice-Chancellor, University of Otago
		Vice-Chancellor, Professor Karen O'Brien	Head of Humanities Division, University of Oxford
		Vice-Chancellor and President, Professor Andrew Parfitt	Provost, University of Technology Sydney
		President, Professor Ed Brinksma	President, Hamburg University of Technology
		Vice-Chancellor and President, Professor Carolyn Evans	Deputy Provost, University of Melbourne
 THE HONG KONG POLYTECHNIC UNIVERSITY 香港理工大學		President, Professor Jin-Guang Teng	Vice-President, Dean of Graduate School, Southern University of Science and Technology
		President and Principal, Professor Shitij Kapur	Dean, Faculty of Medicine, Dentistry and Health Science & Assistant Vice-Chancellor (Health), University of Melbourne
		President, Professor Teck Hua Ho	Provost, National University of Singapore
		Professor Hugh Brady	President, University of Bristol
		Vice-Chancellor and President, Professor Margaret Sheil AO	Provost, University of Melbourne

Select Track from Provost (and related) Searches in North America

The below were led by **Gordon Lobay with Ben Crase** and the wider proposed project team supporting him on most.

- Provost and Vice-President Academic, University of British Columbia
 - Appointed: Dr. Gage Averill, Provost and Vice-President, Academic pro term, University of British Columbia
- Provost and Vice-President Academic, University of British Columbia (Okanagan Campus)
 - Appointed: Dr. Rehan Sadig, Executive Associate Dean in the School of Engineering, University of British Columbia
- Vice-President Academic and Provost, University of Victoria
 - Appointed: Dr. Elizabeth Croft, Dean of Engineering, Monash University
- Vice President Academic and Provost, Brandon University
 - Appointed: Dr. Kofi Campbell, VP Academic and Dean, Renison University College, University of Waterloo
- Provost, New York University (Abu Dhabi Campus)
 - Appointed, Dr. Arlie O. Petters, Benjamin Powell Distinguished Professor of Mathematics, Duke University
- Provost & Vice-President Academic, University of Saskatchewan
 - Appointed: Dr Anthony Vannelli, Dean of the College of Physical and Engineering Science, University of Guelph
- Vice-Provost and Associate Vice-President, Students and International, Simon Fraser University
 - Appointed: Rummana Khan Hemani, Registrar and Executive Director, Student Enrollment, Simon Fraser University
- Vice-Provost and Associate Vice-President, Teaching and Learning, Simon Fraser University
 - Appointed, Prof. Elizabeth Elle, Professor & Chair, Department of Biological Sciences, Simon Fraser University
- Principal, Glendon Campus, York University
 - Appointed: Dr. Marco Fiola, Professor Languages, Literatures and Cultures, Toronto Metropolitan University
- Deputy Provost, Markham Campus, York University
 - Appointed: Dr. Gordon Binsted, Dean, Faculty of Health and Social Development, University of British Columbia, Okanagan Campus
- Dean and Associate Provost, Graduate Studies, Simon Fraser University
 - Appointed: Dr. Mary O'Brien, Senior Associate Dean (Policy and Program Development) in the Faculty of Graduate Studies, University of Calgary
- Vice-Provost, Research and Innovation, Stevens Institute of Technology
 - Appointed: Edmund Synakowski, Vice President for Research, University of Nevada
- Vice-Provost and Chief Librarian, University of Alberta
 - Appointed: Dale Askey, Associate University Librarian for Library & Learning Technologies, McMaster University

Sample Provost Appointments (Global)

Institution	Role	Name of Placed Candidate	Former Organisation of Placed Candidate
 UNIVERSITY of York	Provost	Ongoing	
 UNIVERSITY OF BIRMINGHAM	Provost	Ongoing	
 جامعة نيويورك أبوظبي NYU ABU DHABI	Provost	Dr Arlie Petters	Benjamin Powell Distinguished Professor of Mathematics, Duke University
 جامعة خليفة Khalifa University	Provost	Dr Derek Woollins	Vice Principal (Research and Innovation), University of St Andrews
 THE UNIVERSITY OF AUCKLAND Te Whare Wānanga o Tāmaki Makaurau NEW ZEALAND	Provost	Professor Valerie Linton	Executive Dean of the Faculty of Engineering and Information Sciences, University of Wollongong
Imperial College	Provost	Professor Ian Walmsley	Pro Vice-Chancellor Research and Innovation, University of Oxford
 香港中文大學 The Chinese University of Hong Kong	Provost	Professor Alan Kam-Leung Chan	Vice-Dean, Faculty of Arts and Social Sciences and Associate Provost National University of Singapore
 THE UNIVERSITY of EDINBURGH	Provost	Professor Kim Graham	Pro Vice-Chancellor for Research, Innovation and Enterprise, Cardiff University
 香港 Baptist 大學 The Hong Kong Baptist University APOSTOLIC BIBLES	Provost	Professor Guo Yike	Vice-President (Research and Development), Hong Kong Baptist University
 UNIVERSITY OF BIRMINGHAM	Provost Dubai Campus	Professor David Sadler	Vice-Principal International, Queen Mary University of London
 KING'S COLLEGE LONDON	Provost	Professor Nicola Phillips	Vice President & Vice Principal (Education), King's College London

Recent 'Select' Track Record of Vice-Presidents and Dean searches in Canada

The below were led by **Gordon Lobay with Ben Crase** and the wider proposed project team supporting him on most.

'Select' most recent post-secondary searches in Canada

- University Librarian, Laurentian University, ongoing
- AVP, Students, Laurentian University, ongoing
- Dean, Faculty of Business Administration, University of Regina, ongoing
- Dean, York University Libraries, York University, ongoing
- Dean, Faculty of Education, University of Prince Edward Island (2023)
 - Appointed: [Dr. Miles Turnbull](#)
- Dean, Osgoode Hall Law School, York University (2023)
 - Appointed: [Professor Trevor C. W. Farrow](#)
- Dean of the Peter B. Gustavson School of Business, University of Victoria (2023)
 - Appointed: [Dr. Anita Bhappu](#)
- Dean and Associate Provost of Graduate Studies, Simon Fraser University (2023)
 - Appointed: [Mary O'Brien](#)
- Founding Dean, School of Medicine & Vice-President, Medical Affairs, Toronto Metropolitan University (TMU) (2023)
 - Appointed: [Dr. Teresa Chan](#)
- Chief Librarian, Toronto Metropolitan University (TMU) (2023)
 - Appointed: [Mark Robertson](#)
- Dean of Engineering and Applied Science, University of Regina (2022)
 - Appointed: [Philip Choi](#)
- Dean, Faculty of Health and Social Development, University of British Columbia (Okanagan Campus) (2023)
 - Appointed: [Dr. Marie Tarrant](#)
- Dean, Goodman School of Business, Brock University (2022)
 - Appointed: [Barry Wright](#)
- Associate Vice-President, International, University of Victoria (2022)
 - Appointed: [Dr. A.R. \(Elango\) Elangovan](#)
- Vice-President of Research and Graduate Studies, Concordia University (2022)
 - Appointed: [Dominique Bérubé](#)
- Dean, Desautels Faculty of Management, McGill University (2021)
 - Appointed: [Dr. Yolande Chan](#)
- Vice-President, Research, Queen's University (2021)
 - Appointed: [Nancy Ross](#)
- Dean, Peter A Allard School of Law, University of British Columbia (2021)
 - Appointed: [Ngai Pindell](#)

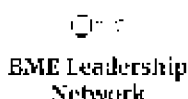
Equity, Diversity and Inclusion; Anti-Racism; & Indigenization

Like MUN, we hold the principles of equity, diversity and inclusion (EDI), anti-racism, and Indigenization at the centre of our activities. These values have been fundamental in the development of our process and approach, our candidate engagement, and the advocacy role we play in diversifying the senior leadership and research teams of our client institutions. We are deeply committed to helping our clients achieve significantly increased diversity, across all characteristics, in their leadership and research teams. Our combination of extensive, fresh identification of candidates, and our global networks and sectoral knowledge means that we can identify and meaningfully engage with a wider, diverse and higher caliber candidate universe. In addition to ensuring a diverse 'longlist' of candidates, we are experienced in aiding committees' understanding and awareness of unconscious bias, as well as advocating for the specific strengths a candidate from an equity-deserving background may deliver, in addition to meeting the required attributes the role may demand. Further aspects of our systematic approach that ensure every search reaches a diverse global range of candidates is as follows:

- We listen carefully to our clients' needs from the outset of the search. What are the diversity-related issues specific to your organization and to this position? Specifically, what are the deeper considerations and context at MUN which we must be sure to communicate to candidates?
- We have developed – and continue to develop – networks of high-level individuals in each sector which we call upon to advise on a diverse range of candidates. We would use networks and awards in relevant fields in the candidate identification process;
- During the course of a search, we review the candidate field regularly to ensure the candidate field is diverse and that we are running a fair and equitable search at every stage of the process;
- Regular structured training and debate takes place within the company on diversity related issues. This ranges from introductory training and functional team-based workshops to talks by public figures and participating in external events;
- Our searches play an important part in the enhancement of the diversity of people holding key leadership and research leadership positions in a variety of sectors around the globe. Furthermore, we work with a variety of organizations whose primary focus is the promotion of EDI.

Our firm has a passion for supporting organizations that go beyond performative allyship to deeply reflect upon the needs specific to its community in partnership with faculty, students and administrators, as we have done with many universities and mission-driven organizations globally. The public is increasingly identifying institutions which engage in virtue signalling and under scrutiny fail to live up to the impact for which they claim. In institutions such as these, leadership have sacrificed meaningful programs and initiatives for fear of undermining academic reputation and are facing a public outcry for enabling an antiquated system to survive which reinforces structural barriers and racism.

To support institutions in their pursuit of equity, diversity, and inclusion, we work with post-secondary education institutions on searches targeted at appointing faculty members from equity-deserving groups to increasing representation among a given organization's senior leadership. We have also been proactive in supporting pipeline building in all the sectors in which we operate. Most recently this has taken the form of networks (BIPOC Leaders) and capacity building (through our Governance Apprenticeship Programme). We are running pioneering sector-wide and international programmes focussed on driving diversity, for instance our sector-leading partnership with Sport England which seeks to diversify the governing bodies of national sports organisations.



Globally, we partnered with the Rhodes Trust in appointing their latest Dean of the Rhodes Scholarships in a process which focused on strong leaders with commitment to EDI and working with youth and resulted in the appointment of Dr Doyin Atewologun. The University of Cambridge also chose us to assist with the appointment of a new master of Jesus College, a process which resulted in the appointment of an [REDACTED]

To ensure diversity throughout the process, we will:

- Design a process that promotes inclusivity and a diverse field of candidates;
- Offer unconscious bias training (and/or compliment your internal teams in delivering this training);
- Advise on salary benchmarking to develop fair remuneration packages;
- Use inclusive and accessible language and imagery;
- Conduct monitoring on your behalf;
- Seek diverse candidate recommendations and explicitly encourage applications from equity-deserving individuals;
- Design longlist assessment to include rather than exclude candidates for interview;
- Explore the shortlisted candidates' level of commitment to EDI issues, and how this has been evidenced in their careers to date;
- Support positive action when committees are split over the suitability of equity-deserving candidates.

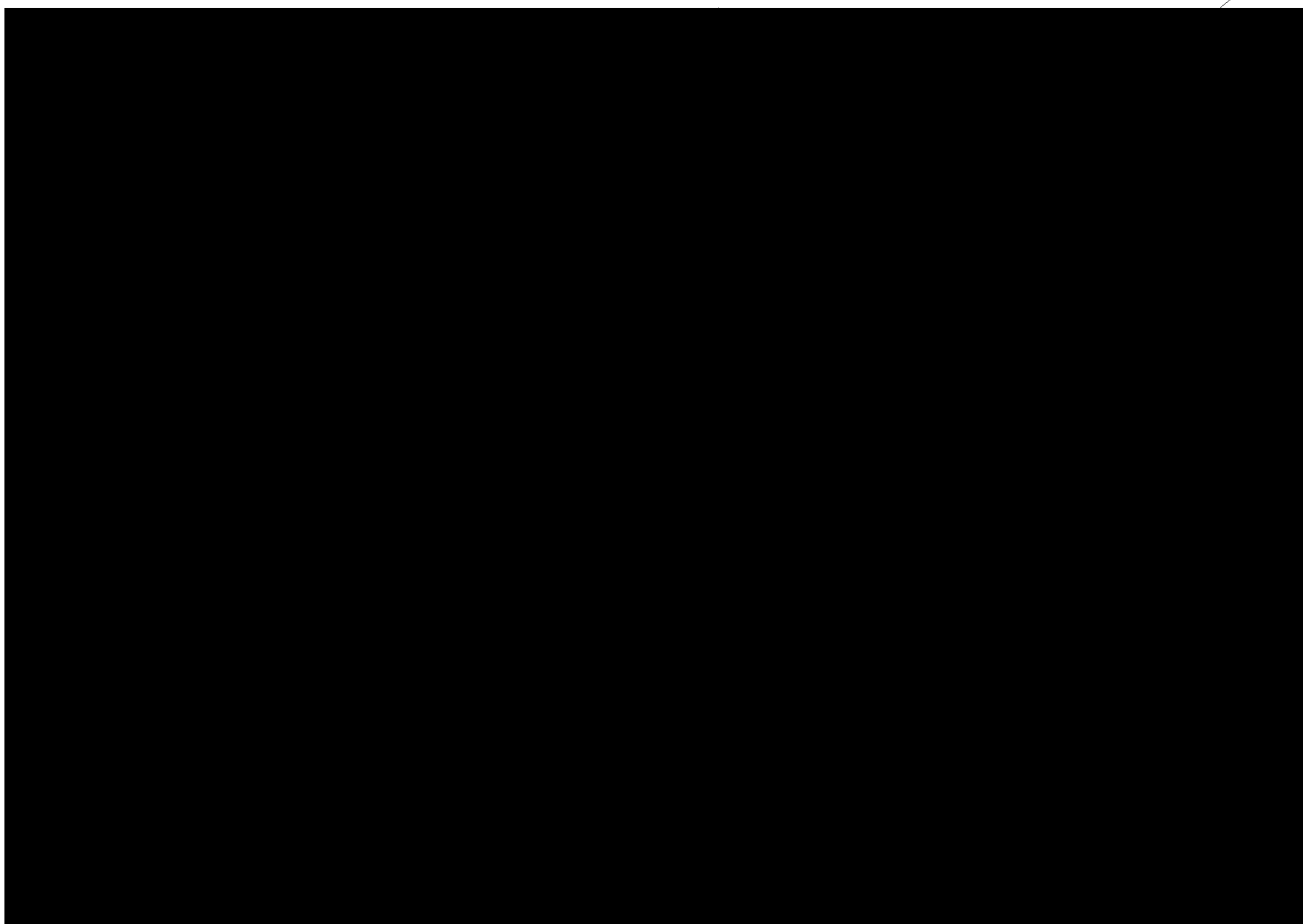
Delivering a Diverse Field and Appointment

Universities can be powerful beacons of diversity and inclusion, but leaders must be visible advocates in pursuing inclusion and building participation. Perrett Laver is deeply committed to improving diversity and inclusion at executive and board level. We challenge ourselves to act differently through our work. Our expertise is often sought for diversity focused searches. Our commitment to supporting diverse groups is reflected in our attitude towards our colleagues, candidates and our clients. Perrett Laver has recently launched in the UK our BIPOC network in the hopes of building a supportive community and safe space for aspiring and experienced leaders across all the sectors we serve.

In the context of Presidential appointments, we have successfully led numerous searches that have appointed diverse candidates to leadership roles for prestigious higher education institutions in Canada, Europe and Asia.

President and Vice-Chancellor appointees contributing to diversity of senior leadership teams:

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Case Studies: Equity-Deserving Appointments

Institution Role



Founding Dean, School of Medicine & Inaugural Vice-President, Medical Affairs, Toronto Metropolitan University

Perrett Laver worked with Toronto Metropolitan University (TMU) on the appointment of the Founding Dean of the School of Medicine and Inaugural Vice-President, Medical Affairs. The appointee will provide strategic, academic and operational leadership and management to lead and deliver the vision, mission, design and implementation of the School of Medicine. The appointee will also advocate and champion, both internally and externally, the School’s mission and mandate to offer a new approach to medical education in Ontario and foster academic excellence, commitment to equity and community inclusion, and innovation to address the changing needs for health-care delivery and practice.

After an exhaustive search, the finalist list was intentionally inclusive comprising candidates from a wide variety of sectors including hospitals, universities, research institutes, medical boards, and think tanks. The successful candidate was Dr Teresa Chan, an accomplished educator, emergency physician, and researcher. Prior to her appointment, Teresa was Associate Dean, Continuing Professional Development and Associate Professor, Emergency Medicine at McMaster University.

Dean, Desautels Faculty of Management, McGill University



Perrett Laver worked with McGill University on the appointment of the next Dean of the Desautels Faculty of Management. The Dean had the opportunity to strengthen Desautels’ commitment to creating an integrated, globally-oriented, ethical and lifelong approach to educating current and future leaders by fostering rigorous, insightful, research and influential thought leadership dedicated to economic and social value creation.

After an exhaustive international search, the finalist list was truly global in nature with senior administrators from leading universities including: London Business School, University of Michigan, International Institute for Management Development (IMD), University of New South Wales and the University of Toronto. The successful candidate was Yolande Chan, the E. Marie Shantz Professor of Digital Technology and Associate Dean of Research, PhD and MSc Programs at the Smith School of Business at Queen’s University. Committed to advancing institutional priorities in the area of equity, diversity and inclusion (EDI), she co-chaired a 2017 university-wide review of racism, diversity and inclusion at Queen’s, and serves on the Queen’s University Council on Anti-Racism and Equity and on Smith School’s EDI taskforces.

Dean, Peter B. Gustavson School of Business, University of Victoria

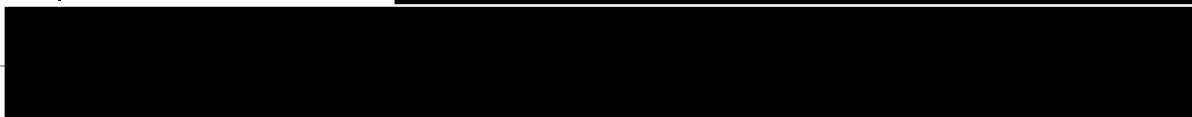


University of Victoria

Perrett Laver was engaged to support the Peter B. Gustavson School of Business at the University of Victoria on the appointment of its next Dean. The preferential search process aligned with Gustavson’s values and commitment to EDI, and Perrett Laver reached out to over 300 candidates in the candidate outreach phase.

After an international search, Perrett Laver presented a shortlist of 17 strong candidates from equity seeking backgrounds. Candidates come from institutions in Canada, US, UK, and Australia such as University of Western Australia, SUNY Buffalo, University of Edinburgh, University of Ottawa, and University of British Columbia. The successful candidate was Dr Anita Bhappu, Associate Professor, Department Chair of Management of Complex Systems, and Associate Dean for Student Success i the School of Engineering at the University of California Merced. Dr Bhappu impressed the Committee with [REDACTED]

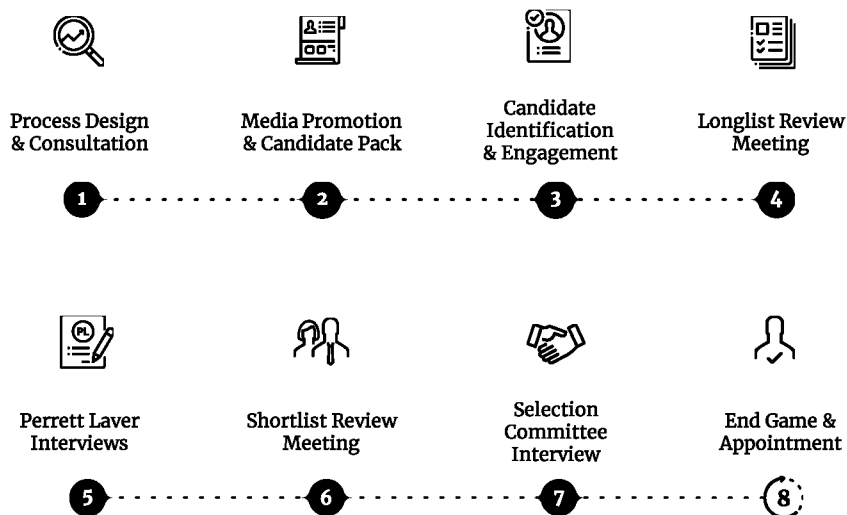
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Process

Exceptional methodology is crucial in making world class appointments. We work entirely in response to the Committee's wishes, but at all times bring forward the best advice drawn from our experience.

We pride ourselves in adding value at every stage of the process; ensuring innovation, exceptional client and candidate care and that we meet or exceed our diversity ambitions.



Process Design & Consultation

At the outset, the lead Partners would meet with the Chair and Selection Committee members in order to plan the process in detail. An early stage would be university-wide consultations designed to develop a thorough understanding of the role and the institution. This process should also express the level of engagement and participation that the Committee believe is right for MUN. Together, our teams discuss the skills and experience required, the opportunities the role presents, and the broader context of the University. We design a flexible process, to be delivered with efficiency and professionalism. We will:



Diversity

- Design a process that promotes inclusivity and a diverse field of candidates
- Agree on targets with the Committee
- Offer training on unconscious bias and protected characteristics
- Advise on salary benchmarking to develop competitive remuneration packages within the MUN framework



Client Care

- Engage and align with stakeholders across MUN to ensure the process kicks off with maximum consultation and transparency
- Ensure that the Committee is the visible owner of the process
- Herald an appropriately transparent, participatory process
- Promote the role internally



Advertisement, Microsite & Candidate Brochure

Perrett Laver works with the communications and marketing teams in order to draft text for the advertisement, micro/website and candidate brochure, including finalising the job description and person specification. We place the advertisement in agreed publications, handle responses, and turn down unsuccessful applicants. We will:



Diversity

- Encourage you to use explicit equality of opportunity, inclusivity and fairness statements
- Age and gender proof all materials
- Use inclusive and accessible language and imagery
- Conduct monitoring on your behalf



Client Care

- Work with your Communications and HR departments, as appropriate
- Advise on marketing and social media strategy
- Support the administration of the process



Candidate Care

- Develop informative clear candidate information material
- Outline a clear, transparent process



Candidate Identification & Engagement

We follow a comprehensive and systematic research strategy. This strategy covers organisations, individuals and networks that intersect with your requirements such that we can generate a diverse field of highly qualified candidates. Conversations with candidates are marked by a compelling and candid presentation of the University, the role and life in St John's, and the Canadian post-secondary education and research landscape.



Diversity

- Conduct a search without boundaries, using our exceptionally wide range of networks
- Be fresh and creative in approach to attract a broad field of candidates
- Make intelligent use of new technologies for search
- Specifically, seek diverse candidate recommendations
- Explicitly encourage applications from female and other minority/Indigenous applicants



Client Care

- Feedback the major themes emerging from the market, useful information for the subsequent process where the University 'courts' the shortlisted candidates themselves
- Provide weekly written updates on the development of the candidate field



Candidate Care

- Allow potential candidates to have very honest exploratory conversations with the lead Partners
- Advocate from a position of trust
- Encourage and reassure potential applicants of their candidacy
- Be an informed, nuanced and persuasive third-party voice
- Discuss any complicating factors early, mitigating the risk of candidate withdrawals
- Assess candidates on their skills, experience and fit



Longlist Review Meeting

We meet with the Selection Committee to present a formal status report, discuss all emerging candidates and share confidential materials electronically with the Committee. We also engage the Committee in debate and discussion of the emerging strengths of the field. We help select those whom you wish to take forward to first round interview.



Diversity

- Present a full picture of candidates' strengths
- Encourage the Committee to focus on candidates' transferable skills and experiences
- Support the Committee in making decisions without unconscious bias



Client Care

- Note your thoughts to incorporate into our interviews and feedback at the shortlisting stage
- Report key themes emerging from the candidate generation phase



Candidate Care

- Support all candidates as they develop their materials and letters of application
- Provide clear and constructive feedback to unsuccessful candidates



Perrett Laver Interviews

Candidates chosen for first round interview are invited to meet with the lead Partners. Our interviews assess candidates' achievements and experience against the role specification. We also aim to understand their innate capabilities, motivations and values so that we can consider their potential for success within the University.

Diversity

- Provide a robust, inclusive and candidate-friendly process
- Assess the candidates against the selection criteria



Client Care

- Progressively test candidate interest and suitability
- Positively advocate the University and uphold your reputation throughout
- Gather due diligence



Candidate Care

- Allow candidates to deepen their knowledge of the University and consolidate their excitement about the role
- Offer continued reassurance in regards to confidentiality and data privacy
- Maintain close relations, providing regular updates as and when appropriate



Shortlist Review Meeting

We meet with the Selection Committee and present our assessments and recommendations as to the most appropriately qualified candidates for the shortlist. We present full written biographies detailing the nature of each recommended individual's career with our in-depth assessment against the brief as to their particular strengths, capabilities, weaknesses and alignment with the University. During this meeting we also discuss the full field of candidates, considering why certain candidates were deemed below the line against your specification criteria.



Diversity

- Encourage the Committee to focus on candidates' transferable skills and experiences
- Support positive action when panels are split over the suitability of a candidate from a protected characteristic under-represented in the organisation



Client Care

- Provide complete and accurate paperwork
- Discuss the full field of candidates, considering why certain candidates were deemed below the line



Candidate Care

- We offer full feedback to unsuccessful candidates
- Where appropriate, provide guidance and mentorship to candidates



**MUN
Interviews**

We understand that challenging but flexible and candidate-friendly processes yield the best results. We work extensively with our clients to ensure that these interactions are fair, robust and competitive.

We are experienced in operating different models of competition, one model being a two stage filter from a larger group of shortlisted candidates (c. 6 or 8) that is assessed and reduced to a final interview list (c.3 or 4), or a single competition where all shortlisted candidates (c. 5 or 6) are assessed all the way through to final interviews. We can discuss with the University what might be your preferred option. Of course, the choreography of the final stages of the appointment process will need further discussion

Additional assessment might include:

- informal conversations with key stakeholders
- bespoke leadership testing
- familiarisation visits
- references and informal soundings
- presentations
- Committee interviews



Diversity

- Work with the Selection Committee to create an appropriate interview setting in which all candidates can excel
- Refresh training on unconscious bias
- Support the construction of interview questions that are guided by the selection criteria



Client Care

- Arrange the logistics for all interactions (including travel arrangements)



Candidate Care

- Coach candidates in advance
- Provide full oversight of process



**Transition and
Commencing
Appointment**

We support extensively in the period after announcement all the way through to a review of the first few months in post



Candidate Care

- We work discreetly during the period prior to the appointee commencing the role in order to ensure that the process of transition is smooth. It is rare that we are required to intervene and this process is almost universally one that sits between the University and the appointee
- In the first 3 and then after 6 months following commencement of appointment we follow up formally with the new President and confirm that there are no issues or items arising of concern.
- For international appointees, we provide support – if needed and helpful – in terms of introductions to peers, relevant advisors and informal sources of help that sit outside of the formal context

Logistics of a Candidate Search Process

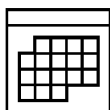
At Perrett Laver, we work to deliver a smooth and straight-forward process for all candidates. Each of our searches has a dedicated Project Manager who would liaise directly with both candidates and the University of Iowa on all logistical matters, including airline travel and accommodations, interview scheduling, and arranging virtual interviews. We pride ourselves on exceptional candidate and client care and deliver world-class administration on each search. We have project managers based in Pacific, Central and Eastern time zones to ensure we always have support on hand should any logistical or technical issues arise, to ensure we can resolve these issues quickly and keep search processes moving forward. More specifically, our team can offer:

Arranging Candidate Travel and Accommodations



- Liaising with candidates and providing options for travel
- Booking all candidate flights and hotel stays in accordance with any travel guidelines provided by MUN
- Managing all candidate expenses and reimbursements with candidates and MUN
- Proactively checking in with candidates to ensure travels went smoothly
- Providing specific information to candidates on interview processes, schedules, directions and other logistic details for any campus visits or airport interviews
- Providing candidates a point of contact at MUN should they have questions or concerns

Scheduling Meetings and Interviews



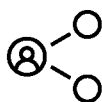
- Coordinating and scheduling all necessary meetings throughout the duration of a search as required (briefings, committee meetings, virtual interviews, stakeholder engagements, etc.)
- Polling committees on agreeable times to meet and managing calendars as required
- Holding various time slots in calendars and rescheduling meetings when necessary
- Drafting and distributing agendas for committee meetings as required

Touch Points and Follow Ups



- Providing summaries of complex calls to determine action items for Perrett Laver and MUN
- Engaging in proactive outreach on outstanding items

Sharing Candidate Information
















- Creating and distributing candidate application packages that summarize the full candidate field in a digestible, easily navigable format
- Creating and distributing committee panel packs, interview questions, and any other items required for the search committee to be successful in reviewing and interviewing candidates throughout a search process
- Ensuring all candidate information is handled with care and only shared with clients in a manner that meets our strong Data Protection and Privacy Guidelines

Proposed Schedule

We recognize the importance of momentum in making appointments of this nature. We would emphasize the importance of allowing sufficient time to engage candidates (at least 30 days) and for Perrett Laver consultants to interview longlisted candidates in preparation for shortlisting.

The below represents an indicative timetable that we could apply to this search process. We would wish to discuss this with you in depth in order to further refine and tailor this to your specific needs.

Date	Action
	Week 1 - 4 Process Design Community Consultations and Briefing Meetings
	Week 4 Advertisement and Candidate Brochure drafted for sign off
	Week 4 Candidate Identification commences Advertisement goes live
	Week 5 – 9 Candidate Generation Regular updates with the Search Committee
	Week 9 Longlist Review Document sent
	Week 10 Longlist Review Meeting
	Week 11 – 12 Perrett Laver Assessment Interviews
	Week 12 Shortlist Review Document sent
	Week 13 Shortlist Review Meeting
	Week 16 - 17 First Round Final Interviews (typically of 6 – 8 candidates) followed by a decision meeting to reduce the field to 2-3 candidates
	Week 18 - 19 Second Round Interview (of final 2 – 3 candidates). Formal references for shortlisted candidates are taken at this time. Following the second round a decision meeting is held to decide upon the preferred candidate and a ranked order of any remaining candidates
	Week 20 - 22 Negotiations & any additional references taken for the preferred candidate
	Thereafter Appointment announced – and any on-boarding plans developed/enacted

Project Team

This assignment would be led by Gordon Lobay (as lead consultant), and he will be supported by our consultants Ben Crase and Maria Rivas-Rivero. They would work in close collaboration with Emily Jarvis as Principal Project Manager and a dedicated Researcher making up the core project delivery team. The consulting team would be accountable to you throughout the search and would participate in briefing conversations, candidate screening activity, and all meetings.

We operate as a global firm and are committed to leveraging our collective knowledge for our clients. We would draw upon the experience, connections and market knowledge from colleagues across all of our global offices to ensure that we are able to deliver the most comprehensive and diverse candidate field possible. Ensuring an inclusive team environment that reflects Canada's diversity is critically important to our firm. Though there is more work to do, we are proud to recognize that 67% of our North America team identifies as women and 38% come from equity-deserving communities.

Lead Consultant - Gordon Lobay, PhD

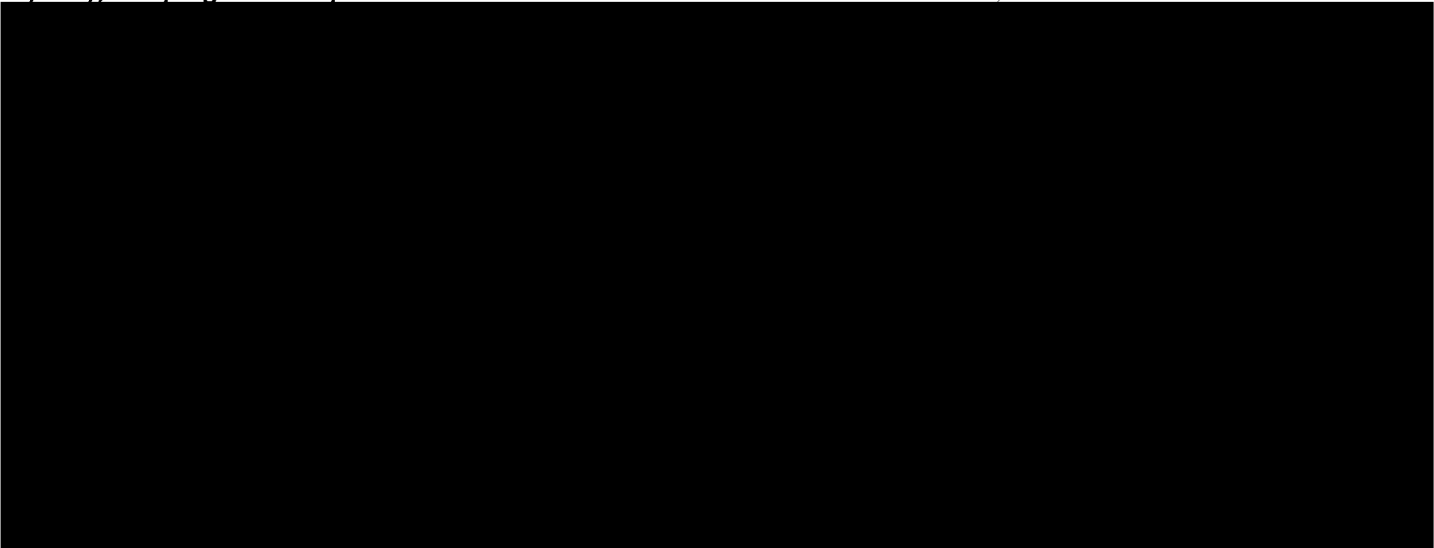
Regional Managing Partner – Americas

Gordon.Lobay@perrettlaver.com / mobile: [REDACTED] s. 40 (1) [REDACTED] s. 40 (1)



Gordon is the Regional Managing Partner – Americas. [REDACTED] where he leads our Canadian operations and Higher Education practice, as well as overseeing the Firm's broader development across North and South America. He works across all of our practices and specializes in finding senior academic leaders and research chairs for the world's top universities. s. 40 (1)

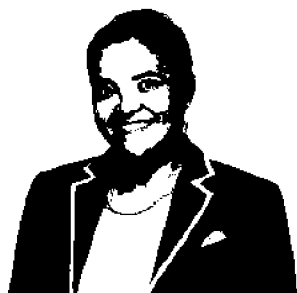
Gordon has led numerous CEO searches and nineteen university President searches including fourteen in Canada, eight of which are U15 Presidents, namely: Dalhousie (Kim Brooks); McGill (Deep Saini), UBC (Santa Ono), Waterloo (Vivek Goel); Manitoba (Michael Benarroch); Saskatchewan (Peter Stoicheff); Queen's (Patrick Deane); Alberta (David Turpin); and currently Toronto. Outside the U15 he led the recent President searches at UVic (Kevin Hall), Carleton (Benoit-Antoine Bacon), Brandon (David Docherty), NSCAD (Peggy Shannon), Brock (Lesley Rigg), and UPEI (Wendy Rodgers). He co-led searches for the Vice-Chancellors (Presidents) of Otago (David Murdoch), Lincoln (Grant Edwards), VU Wellington (Nic Smith), and recently Otago again (Hon. Grant Robertson). He has contributed significantly to Perrett Laver's global university President/VC searches at Oxford, Cambridge, Imperial, UCL, EPFL, Sydney, Nanyang and many others.



Gordon holds a B.A. in Classics and Anthropology from the University of Alberta, an MPhil in Archaeology from Glasgow, a PhD (on the looting and illegal trading of antiquities) from Cambridge (Homerton College) and a Corporate Executive Certificate from the Alberta, School of Business. [REDACTED]



Consultants and Team Members (cont'd)



Maria Rivas-Rivero

Consultant, [REDACTED] s. 40 (1)

Maria is a Consultant at Perrett Laver. She has a diverse educational background, including a BA in International Studies from UCV in Venezuela, an MBA from EADA Business School in Spain, a Graduate Diploma in American Studies from Sciences Po Paris, and a MA in Geopolitics from Paris I Panthéon-Sorbonne. Prior joining Perrett Laver, Maria gained experience in Alumni Relations and Development at McGill University and served as Business Development and Marketing Manager for a major engineering firm in Canada.



Ben Crase

Consultant, [REDACTED] s. 40 (1)

s. 40 (1)

Ben is a Consultant with experience of senior level executive search processes across academic and administrative appointments in higher education and research globally,



Ben holds a BA (Hons) in History from Trinity College, University of Toronto. Prior to joining Perrett Laver, Ben worked as an advancement associate at a top Canadian independent school.

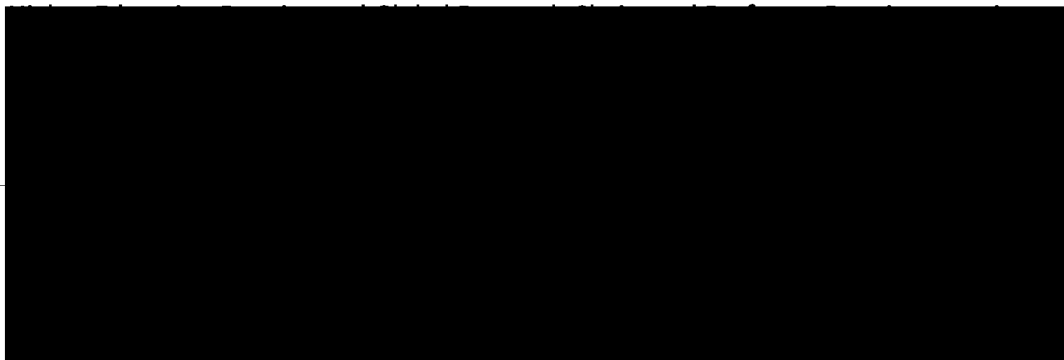


Emily Jarvis

s. 40 (1)

Principal Project Manager [REDACTED] & Head of Project Management, North America

Emily is a Principal Project Manager at Perrett Laver and manages our PM team across North America [REDACTED]



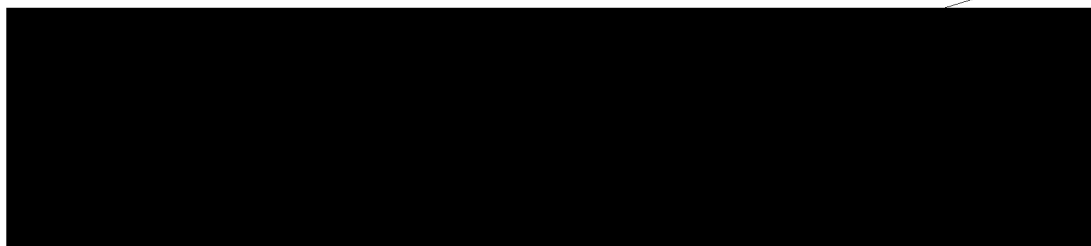
s. 40 (1)



Hazel Levin

Senior Research Associate, [REDACTED] s. 40 (1)

s. 40 (1)



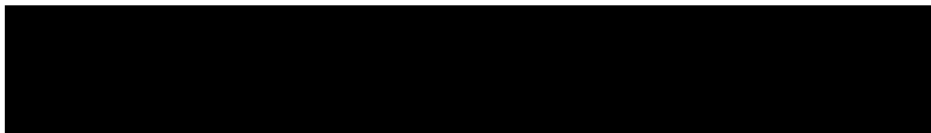
Our Global Team

Gordon and the team will be supported by Dr Birgit Brandt, Bing Han, Erik Jackson, and Josephine Scholten. We operate as a global firm and are committed to leveraging our collective knowledge for our clients. We would draw upon the experience, connections and market knowledge in all parts of the world to ensure that we are able to deliver the most comprehensive and diverse candidate field possible.



Dr Birgit Brandt - Managing Partner, [REDACTED] s. 40 (1)

Birgit has advised extensively on the President / Vice-Chancellor appointments for:



s. 40 (1)



Bing Han – Managing Partner, [REDACTED] s. 40 (1)

Bing has advised on the President / Vice-Chancellor appointments for:



s. 40 (1)



Erik Jackson – Managing Partner, [REDACTED] s. 40 (1)

Erik has supported various US HE institutions including:



s. 40 (1)



Josephine Scholten – Managing Partner, [REDACTED] s. 40 (1)

Josephine has advised on a number of President appointments in Europe including:



s. 40 (1)

Our Wider Consulting Team

Additionally, consulting support may be included in the delivery team as well, not only for direct delivery support but also to leverage the experience of our wider global presence, connections and introductions to candidates. Our global Partners and consultants draw alongside delivery teams on all marquee searches such as this, assisting them in every way possible to generate the best possible field and supporting the delivery team throughout the process. Our consulting team is listed on our website at www.perrettlaver.com.

Subcontractors

While Perrett Laver does not outsource fundamental elements of the search process, we have long-term partnerships with agencies to provide clients with the following services as required:

- Design and placement of the advertisement and design and production of the appointment details documents;
- Some additional assessment elements, such as psychometrics and media assessment.

Client Satisfaction and Retention Rate

We pride ourselves on ensuring that we match individuals to organizations as much as to a particular role.

This is exemplified through our statistics pertaining to placing valued and successful candidates:

- 95% of our searches are successfully appointed and we guarantee to continue our search until an appointment is made;
- 93% of our appointees have remained in post of over 3 years;
- 13% of our placed appointees have subsequently been promoted within the same organization;
- 93% of our appointees are hired within the timelines set out by the client institution;
- 95% of our appointees are hired successfully within the budget set and approved by the client;
- 88% of the assignments we have conducted in the last 12 months have been for existing or returning clients.

Service Guarantees

Subject to our having received payment in respect of all fees, expenses, and recharge invoices issued for the first executive search exercise, we guarantee to carry out a further executive search exercise (as may be described in the Proposal) at no additional cost (save in respect of any expenses that we may incur) in the event that:

- You dismiss any candidate recruited as a result of our Services (or that individual leaves the position for any reason) within one (1) year following the commencement date of such candidate's employment;
- Or the "search process" is unsuccessful (provided that the role and job description remain unchanged). This provided that such further executive search exercise is requested no later than six months following the date you receive our final retainer fee invoice in respect of the original search exercise.

Further, we undertake not to approach as potential candidates any individual employed by you (or your affiliated organizations) as a result of our Services for a period of two (2) years following the date you receive our final invoice in respect of the such individual. Notwithstanding the foregoing, if at any time a candidate employed by you (or one of your affiliated organizations) as a result of the Services expresses a personal interest in a post advertised by us for a role within another organization, then we shall not discourage such candidate from applying for the position advertised save that we will not undertake the 'research process' (as may be described in the Proposal) in respect of such candidate.

Off-Limits and Conflict of Interest Disclosure

Perrett Laver's off-limits policy states that we will not approach any of the individuals we place for other opportunities for a period of two years. As such, our off-limits relates to individuals rather than organizations. There are no Higher Education institutions which are off-limits.

Perrett Laver is currently conducting one University President search in Canada at UofT (currently in the consultation phase). Given the differences in timeline and type of institution between MUN and UofT, we would not consider this a conflict of interest. As a firm, we are currently advising on a small number of University President/Vice-Chancellor searches globally, which we list below:

- Vice-Chancellor, University of Leeds
- Vice-Chancellor, Wrexham University
- Vice-Chancellor, London Metropolitan University
- Vice-Chancellor, University of Hertfordshire
- Vice-Chancellor, The Open University
- Vice-Chancellor, University of Essex
- President, King Abdullah University of Science and Technology
- President, Zayed University
- President, University of Toronto

We would emphasize that all of these international searches are not focused on the North American market. Furthermore, all of them are well underway. We would not consider any of these to be in conflict with MUN. There are times when we do work on more than one university President/Vice-Chancellor searches simultaneously, but we do so only in cases when certain criteria are met to ensure that no conflict is occurring. These key criteria include:

- The likelihood that candidates interested in two roles would be having to interview within the same timeframes for both posts. This situation occurs very rarely indeed – and if interviews are separated by a couple of weeks or more then candidates usually determine to compete for both posts;
- When institutions are sufficiently different; and,
- The ability of the firm to deploy focused attention of senior staff on given assignments.

If we were fortunate to be appointed by MUN to advise upon the President search, we would commit (as we do with all clients) to check with you should we be subsequently invited to advise on a potentially conflicting search.

Postponement

Unless there is a prior written agreement between Perrett Laver and a client institution, a search may be postponed by written notification to Perrett Laver, but can only remain postponed for a maximum of 90 days. If the search is not reinstated prior to this 90-day period, the search will be considered cancelled.

The payment schedule, as listed in this proposal, will apply during any postponements. If there is a significant change in the scope of the search following a postponement, we will consider this contract terminated, and a revised contract with adjusted fees, if necessary, will be negotiated. Our fees are non-contingent and non-refundable.

Accessibility Policy

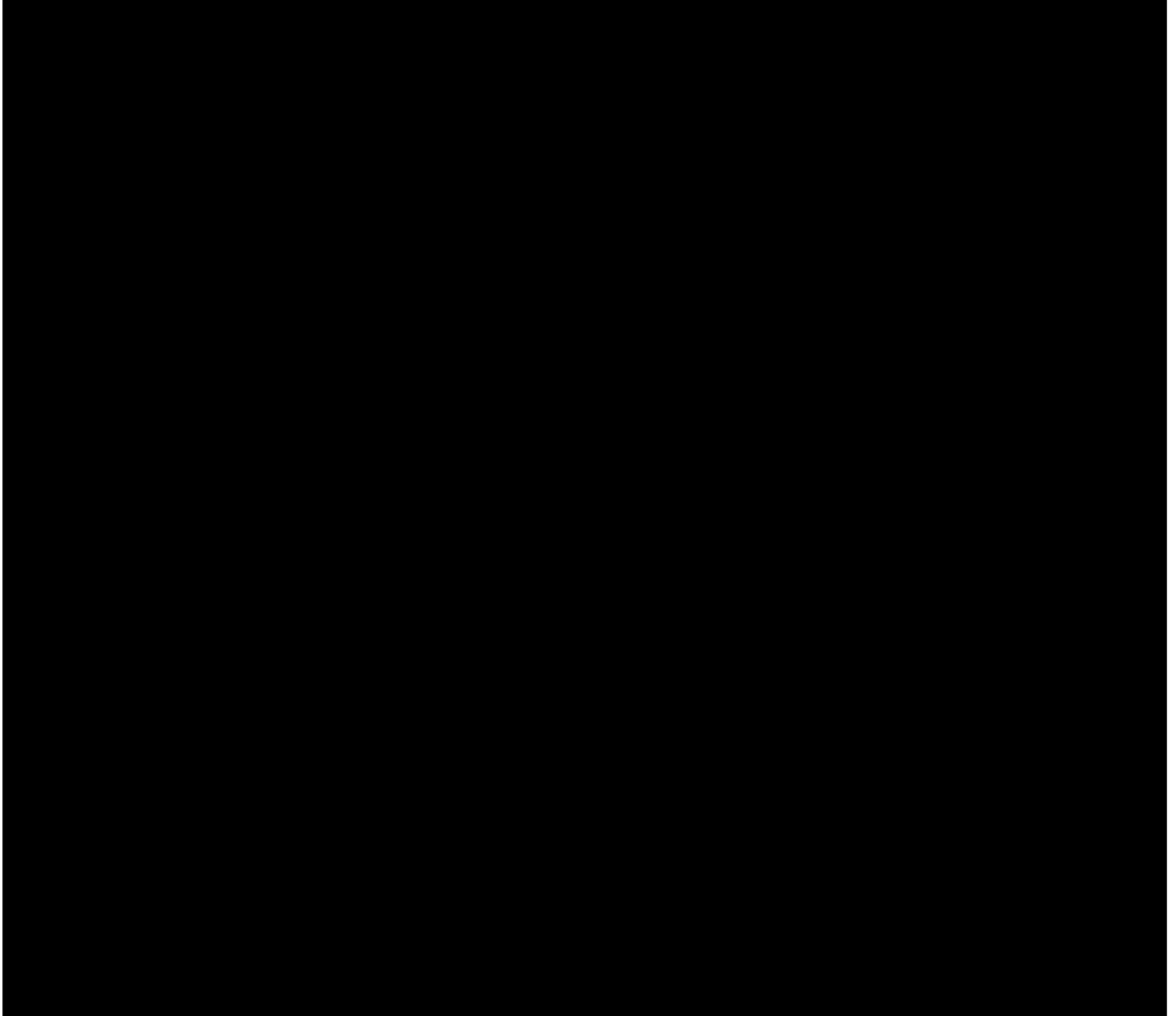
All documentation created by Perrett Laver has been designed to meet accessibility best practices. Please contact us if you require access to the documents in alternative formats. If you have comments that would support us in improving access or our application processes more generally, please do not hesitate to contact us via accessibility@perrettlaver.com



20-24

References

s. 40 (1)



Fees and Invoice Structure

We employ a fixed pricing structure agreed in advance. We believe that good, thorough search is a defined activity where the effort of your advisors should not vary in direct relationship to salary.

We would not wish to lose the opportunity to work with you based on fee alone, if needed, we would be happy further discuss options that would fit your budget.

Proposed fee

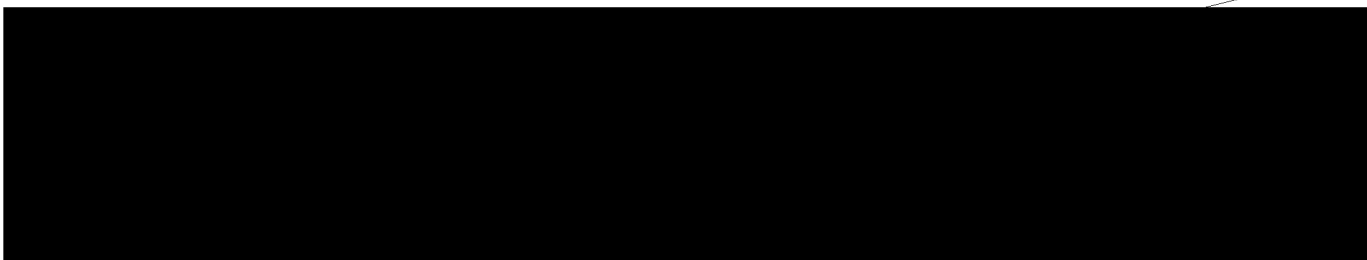
s. 29 (1) (a)



Proposed in four instalments:



s. 29 (1) (a)



Expenses

Expenses are charged at 10% of total fee, this includes all our research costs (without limitation) including directories, subscriptions and telephone calls and all costs relating to domestic travel, subsistence and accommodation for one Consultant to attend an in-person meeting or interview on campus at three separate occasions.

Additional Costs

Additional costs (facilitated by Perrett Laver but invoiced strictly at cost directly by the supplier) will only be incurred subject to your prior approval and could include advertisement design and placement; Appointment Details design; Candidate travel, accommodation and subsistence; international travel, accommodation and subsistence for Consultants, and any production and delivery costs for hard copy paperwork.

Additional Appointments

Unless communicated to you or indicated otherwise within the Proposal, in the event that you recruit more than one individual as a result of our Services then we shall be entitled to charge you an additional fee equal to twenty five per cent (25%) of that recruited individual's first year salary and bonuses (but excluding any stock options, pensions or other benefits) and for the avoidance of doubt, no expense charges (as above) shall apply in the event of the foregoing.

Payment terms

Payment terms are strictly 30 days from the date of invoice. Perrett Laver will commence work immediately on receipt of a signed data sharing agreement and a purchase order number (or once the first invoice has been issued).

Sales Tax

All our fees are subject to relevant sales tax at the normal rate.

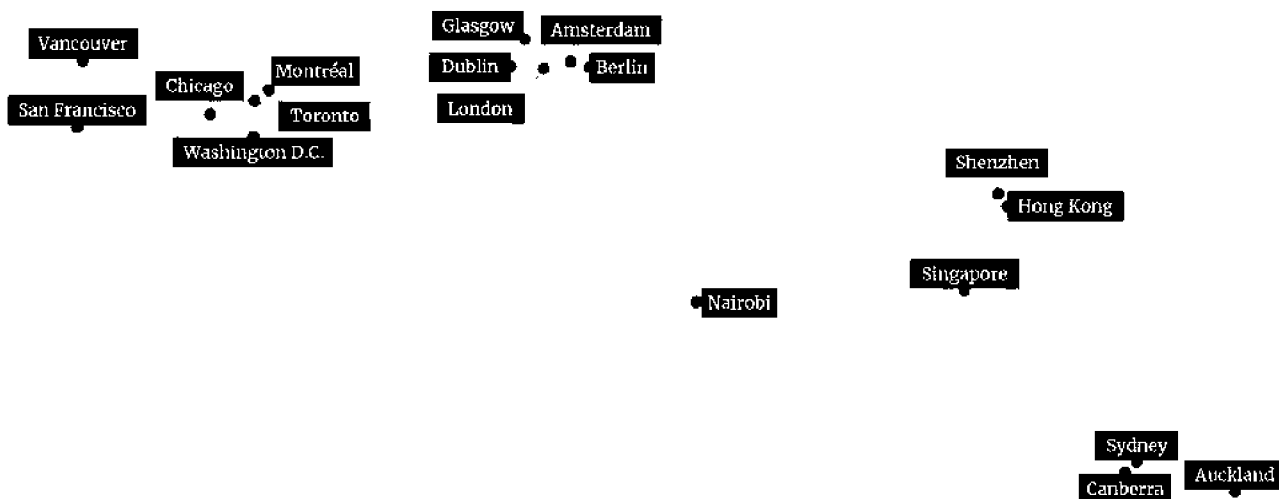
GDPR

Perrett Laver is a Data Controller and a Data Processor, as defined under the General Data Protection Regulation (GDPR), and processes and shares Personal Data in accordance with our Privacy Statement

<http://www.perrettlaver.com/information/privacy>

Unless agreed otherwise, we are required to set up Data Sharing Agreements with our clients in order provide our services and observe Data Protection regulations.

Perrett Laver



- Global offices locations

Signed

[Redacted Signature]

s. 40 (1)

Gordon Lobay, PhD
Regional Managing Partner, Americas

16th May 2024

For Perrett Laver



APPOINTMENT OF THE PRESIDENT AND VICE-CHANCELLOR



NOTE TO APPLICANT: The remainder of the "Appointment of the President and Vice-Chancellor" is available online via:

https://files.upei.ca/competitions/appointment_details_upei_president_and_vice-chancellor.pdf

IAP Office

UPEI pays respect to the Mi'kmaw People of Epekwitk, the Mi'kmaw name for the area now known as Prince Edward Island and a traditional district in Mi'kma'ki. Mi'kma'ki is the ancestral and unceded territory of the Mi'kmaq, who, in 1725, first signed the Treaties of Peace and Friendship with the British Crown. Those treaties did not deal with the surrender of lands and resources, but instead recognized Mi'kmaw title and negotiated a path toward an ongoing relationship between nations. The University of Prince Edward Island community of faculty, staff, and students acknowledge that we carry out our daily work in Mi'kma'ki. We are all treaty people.





McGill

NOTE TO APPLICANT: The remainder of "Appointment of Principal and Vice-Chancellor" is available online via:
https://www.mcgill.ca/secretariat/files/secretariat/principal_appointment_-_final_june_1_2022.pdf

IAP Office



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OUR STRATEGIC PLAN: THIRD CENTURY PROMISE



THIRD CENTURY PROMISE

Si'st Kasqimtnaqnipunqekl
Teli L'wi'tmasimk

DALHOUSIE UNIVERSITY'S
STRATEGIC PLAN 2021-2026



Dalhousie's Strategic Plan (2021-26) builds on our 200+ years of history as one of Canada's leading institutions of higher learning, research, and innovation. *Third Century Promise* is a plan to accelerate Dalhousie on the path to global distinction while further deepening our commitment as a civic university dedicated to uplifting our communities.

STRATEGIC PILLARS

Exceptional student experience

Dalhousie will embark on a sustained campaign to be recognized as the best in Canada and among top ranked universities globally for a transformative learning and life experience, leading students to successful careers, professional designations, or advanced graduate degrees.

Inclusive excellence

We will invest in developing a more welcoming, inclusive, and caring culture for all regardless of one's background and circumstance, with an emphasis on wellness, accessibility, respect, and support for all members of our communities.

High-impact research

Building on our legacy of groundbreaking research and outstanding scholarship, we will continue to focus our efforts on growing world-leading research programs in areas of particular strength and invest in infrastructure that supports our researchers to achieve excellence.

Civic university with global impact

Dalhousie will establish a framework for intentional impact built upon shared priorities established with our governments and other partners.

A foundation for inclusion and distinction

Dalhousie will renew its physical, governance, financial, administrative, and digital infrastructure, and will review and update its multi-campus master plan to identify priorities related to critical infrastructure and facilities renewal.

THE ROLE OF THE PRESIDENT AND VICE-CHANCELLOR

Reporting to the Board of Governors, the President and Vice-Chancellor (President) is the chief executive officer, responsible to the Board of Governors and to the Senate for the supervision of Dalhousie University's administrative and academic work.

The President provides a bold, long-term vision for Dalhousie's future, grounded in an informed understanding of our crucial role in the community while ambitious to grow our impact globally. The President personifies ethical leadership, is committed to Dalhousie's success, and is a passionate advocate for our mission, vision, and values.

The President must be a resilient and experienced leader with the capacity to inspire and influence our world class community of students, staff, and faculty.

They carry themselves with integrity and humility and are adept at building the relationships that Dalhousie needs to thrive into the future. They understand both the need for and the advantages of bi-cameral university governance and academic freedom, and the ability to develop and advance an institutional mandate within these frameworks. They build effective coalitions across stakeholders and sectors to unlock new opportunities for Dalhousie.

The President embraces all that makes Dalhousie unique and is committed to our continued success. The President will be appointed for a period of five years, renewable for a further five years, to a maximum of 10 years.

In undertaking their role, the President embodies Dalhousie's leadership competencies:

- 1. Thinking & Acting Strategically** - The President thinks conceptually about Dalhousie's big picture: our place in the world, across Canada and our region, and how best to achieve our true potential in a deliberate way that includes students, staff, faculty, and community.
- 2. Resource & Process Management** - The President occupies the highest level of accountability for a significant and complex financial organization. They must be able to align resources with goals at a high level in order to achieve the best outcomes and impacts for Dalhousie.
- 3. Equity, Diversity, Inclusion, and Accessibility** - The President must actively pursue and uphold these principles in all of the university's activities. They must serve as a role model and champion for the university's commitments, plans, and strategies (current and historical) in this space.
- 4. Inspiring Leadership & Development** - The President must believe in and inspire a community of Dalhousie citizens who are fundamentally concerned with expanding our capacity to make a difference in the lives of our students and others. This will necessarily involve nurturing a culture of respect, inclusion, and wellness throughout the organization and serving as an inspiring people leader to a team of senior professionals.
- 5. Internal and External Relationship Building** - The President must be exceptionally skilled to build reliable networks of relationships across all of the university's varied stakeholders: faculty, academic and other institutional leaders, students, donors, alumni and other partners in the business communities, African Nova Scotian communities, Mi'kmaq communities, national and provincial governments, and community leaders in the Atlantic region, across Canada and globally. The President must speak and act with integrity, developing partnerships that are critical to the long-term success of Dalhousie University.
- 6. Accountability for Performance & Results** - The President must set an institutional standard for excellence and hold the university accountable for meeting that standard. The President must be able to evaluate and respond to complex requirements in support of organizational direction and must ensure that our established accountabilities are reflected in our policies, practices, and direction.
- 7. Change & Innovation** - The President must be a capable change leader to move Dalhousie University ahead and optimize our impacts as we embark on our third century. They will create the conditions for people to come up with innovative ways to support the university's ability to succeed and manage the risks associated with change.



SELECTION CRITERIA

The following priority selection criteria have been identified as key elements in an ideal candidate. The Search Committee recognizes that no single candidate for the position is likely to meet all the following criteria in equal measure, however it has developed the following criteria as an ideal candidate profile.

Strategic Leadership

- Experience in collegially defining and setting the vision for an organization and implementing strategic plans to operationalize and achieve strategic goals;
- Experience with governing bodies in universities and a demonstrated ability to work with them effectively in a manner that is clear, accountable, and positive;
- A demonstrated commitment to collegial decision-making processes and a commitment to openness and integrity, and maintaining trust in team members through delegation and communication;
- Evidence of an ability to champion an academic and co-curricular learning environment that encourages student engagement and enables a transformative experience for our students;
- Evidence of successfully leading change in complex organizational settings and developing conceptual and tactical strategies to strengthen an organization;
- An ethical leader with a track record of success in building effective, sustainable relationships and experience with building, motivating, and leading diverse teams.

Management and Operational Experience

- Senior administrative and leadership experience overseeing a management team in a unionized setting along with a commitment to academic freedom;
- Demonstrated leadership success on student experience and issues, such as tuition, debt, accessibility, program needs, and employment opportunities;
- Experience in fiscal management, including familiarity with university budgeting processes and pension and fund accounting;
- Demonstrated success in exercising creativity and innovation with limited resources, and in showing resourcefulness in generating new funds from non-government sources;

- Successful experience with maintaining positive employee relations in a unionized setting;
- A demonstrated ability to attract and retain top-level talent, with an understanding of the challenges of staff renewal in a competitive environment.

Academic Credibility and Research Leadership

- A terminal degree in a discipline represented at Dalhousie along with a strong academic or professional leadership track record that will ensure credibility within the university community and beyond;
- A global vision of research and scholarship based on a strong knowledge and understanding of issues facing higher educational institutions in Canada and internationally, including a knowledge of funding sources, industry, and community partnership opportunities.

Indigenization

- Commitment to Indigenization and reconciliation, along with demonstrated experience advancing these principles in their current or previous institutions.

Equity, Diversity, Inclusion and Accessibility

- Commitment to equity, diversity, inclusion, accessibility, and anti-racism, along with demonstrable experience in advancing these principles in their current or previous institutions.

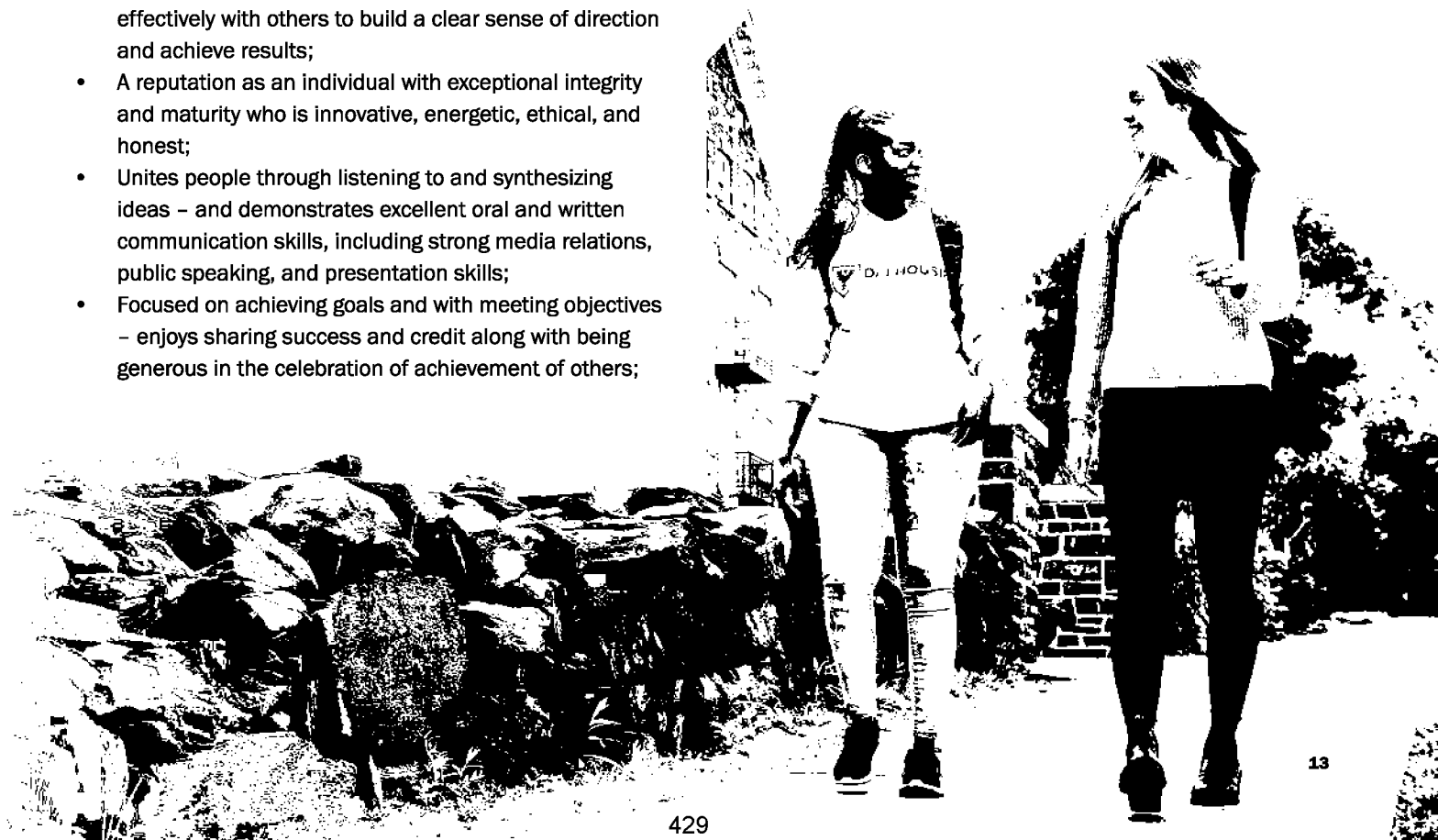
External Relations and Advancement

- Articulate, enthusiastic, and persuasive in representing the university and attracting the support of diverse constituents locally, nationally, and internationally and in engaging external stakeholders, such as business, government, partners in education, donors, community, and alumni;

- Experience working strategically within government frameworks and a comfort working in a non-partisan way with government and opposition parties;
 - A record of success in increasing an organization's revenue through government sources, granting councils, industry partnerships, and fundraising activities;
 - A track record of success in institutional advancement including active engagement and partnership with advancement professionals;
 - Comfortable with a high-profile role in the community, and in presenting opportunities for community leaders to contribute as volunteers and donors to the university;
 - Excellent ambassador skills and ability to build bridges and maintain relationships with local, national, and international communities.
- Exercises good judgment in difficult circumstances, considering both short- and long-term consequences and due process;
 - The capacity to consult appropriately and make sound, fair, transparent, and sometimes difficult decisions – and to openly communicate and firmly implement those decisions;
 - Capacity to work well with all sectors of the university, including students, staff, faculty, unions, senior management, Board, Senate, and alumni;
 - A genuine commitment to students, with a willingness to participate in their events, seek their input, and listen to their concerns;
 - An understanding of university cultures and ecosystems, combined with the ability to invest the necessary time to build strong relationships with faculty and staff;
 - A real desire to be part of the campus and local community, with an appreciation of the unique history, context, and multi-faceted cultures of the region.

Personal and Professional Qualities

- A deep enthusiasm for, and commitment to, the continued success of Dalhousie along with a welcoming manner that is transparent and champions cooperation, interaction, listening, and developing an inclusive and positive university environment;
- Able to articulate a strong and clear vision and generate excitement and passion in others and to work effectively with others to build a clear sense of direction and achieve results;
- A reputation as an individual with exceptional integrity and maturity who is innovative, energetic, ethical, and honest;
- Unites people through listening to and synthesizing ideas – and demonstrates excellent oral and written communication skills, including strong media relations, public speaking, and presentation skills;
- Focused on achieving goals and with meeting objectives – enjoys sharing success and credit along with being generous in the celebration of achievement of others;





ABOUT NOVA SCOTIA

A PLACE FILLED WITH TRANSFORMATIVE MOMENTS.

There's something undeniably special about this place Dalhousie calls home. Nova Scotia brings together the natural beauty of Canada's East Coast with a culture of innovation, inspiration, and community collaboration. The ocean is part of our life here—Dalhousie is just 300 metres from the Atlantic. No surprise, then, that Dalhousie and Nova Scotia are at the heart of a global hub for ocean science, technology, education, defence and energy. With a highly educated population that's poised to double in size in the decades ahead, this is an exciting time to be coming to Nova Scotia.



POPULATION: 439,000

KEY INDUSTRIES:

- Oceans Technology
- Aerospace & Defence
- ICT, Gaming & Interactive Media
- Finance Services
- Life Sciences
- Transportation & Logistics

AVERAGE TEMPERATURES:

- Summer: 23C (72F)
- Winter: 0C (32F)

HALIFAX *Kjipuktuk*

Our Halifax campuses are in the heart of Nova Scotia's capital—one of Canada's fastest-growing cities, located only steps from the Atlantic Ocean. The city has a dynamic energy that generates a diverse food scene and innovative industry hubs, while also embracing beach days and coastal hikes. All of Dal's Halifax campuses are within walking distance of the downtown core, where you'll find art galleries, museums, theatres, festivals, sport events, lively pubs, and quaint cafés.

Two hours closer by air to Europe than any other major North

American destination, and only a short flight to New York and Boston, Halifax is a connected city with education at its core. A university destination, Halifax is home to three Dalhousie campuses (Studley, Carleton and Sexton) as well as three additional universities and several community college campuses. That means a highly educated community: among those ages 25 to 64, 70 per cent have at least some post-secondary education. Halifax's GDP growth rate is forecasted to outpace both national and provincial figures over the next four years.

Halifax has a rich and varied history that is reflected in the

diversity of its population. The Mi'kmaw people have been living in the area for thousands of years, calling it Kjiptuk (The Great Harbour). The City of Halifax was founded on unceded Mi'kmaw territory in 1749 when an English settlement was built on sacred land. Today, there 13 Mi'kmaw communities in Nova Scotia and the Mi'kmaq remain the predominant Indigenous group within the province. A growing proportion of the Mi'kmaw population resides in Halifax.

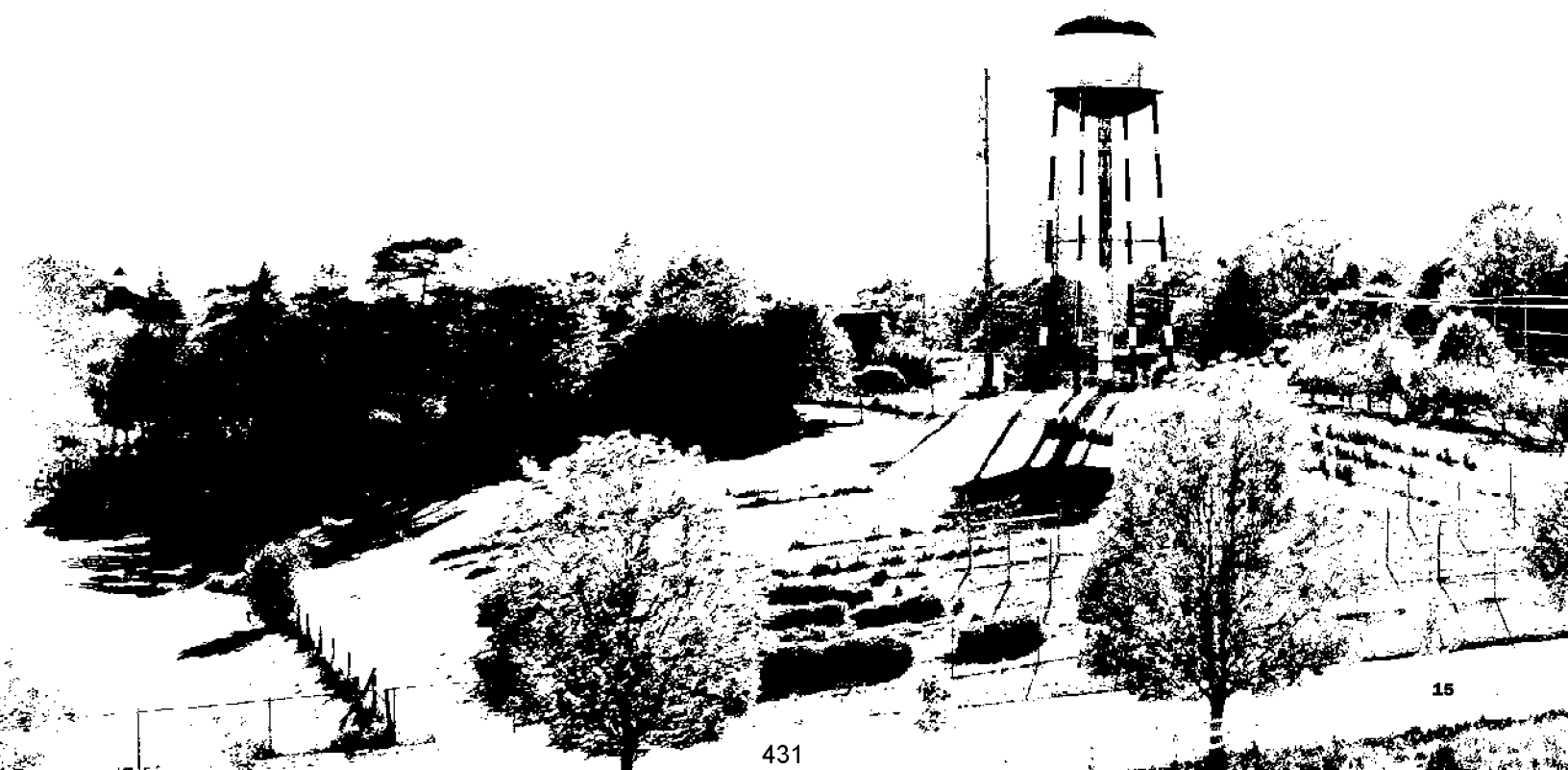
Halifax is also home to a large African Nova Scotian community. African Nova Scotians/ Indigenous Blacks are a distinct people who descend from free and enslaved Black Planters, Black Loyalists, Black Refugees, Maroons, and other Black people who inhabited the original 52 land-based Black communities in that part of Mi'kma'ki known as Nova Scotia.

TRURO

We'kwampetitk

An hour from Halifax you'll find our Agricultural Campus, located in Truro. Known as the "hub of Nova Scotia," with a population of just over 12,000 Truro combines small-town ambience with a full range of commercial and recreational opportunities. Our students frequently head into town to enjoy Truro's beautiful Victoria Park, festivals, Farmers' Market, theatres and unique shopping.

You will also find the Millbrook First Nation located within the town.





HOW TO APPLY



AMERICAS ASIA PACIFIC EMEA

An executive search is being undertaken by Dalhousie's search partner Perrett Laver. Perrett Laver will support the university in identifying a diverse field of qualified candidates and in the assessment of candidates against the selection criteria.

Applications should consist of a full curriculum vitae and cover letter describing briefly how the candidate meets the selection criteria, why the appointment is of interest and what they believe they can bring to the role. A complete application also includes a self-identification form which can be found here.

Further information, including details on how to apply, can be found at <https://candidates.perrettlaver.com/vacancies> quoting reference number **6327**. Interested candidates are asked to submit applications by **Wednesday, March 22, 2023**.

Dalhousie University commits to achieving inclusive excellence through continually championing equity, diversity, inclusion, and accessibility. The university encourages applications from Indigenous persons (especially Mi'kmaq), persons of Black/African descent (especially African Nova Scotians), and members of other racialized groups, persons with disabilities, women, persons identifying as members of 2SLGBTQ+ communities, and all candidates who would contribute to the diversity of our community. For more information, please visit www.dal.ca/hiringfordiversity.

Perrett Laver is a Data Controller and a Data Processor, as defined under the General Data Protection Regulation (GDPR). Any information obtained by our trading divisions is held and processed in accordance with the relevant data protection legislation. The data you provide us with is securely stored on our computerized database and transferred to our clients for the purposes of presenting you as a candidate and/or considering your suitability for a role you have registered interest in.

Our legal basis for much of our data processing activity is 'Legitimate Interests'. You have the right to object to us processing your data in this way. For more information about this, your rights, and our approach to Data Protection and Privacy, please visit our website <http://www.perrettlaver.com/information/privacy-policy>.

INFORMATION ABOUT THE SEARCH COMMITTEE

Chaired by the Board Chair, the search committee is constituted in accordance with the Senior Administrative Appointments Policy and includes representatives from the Board of Governors, Senate, administration and the Dalhousie Student Union.

CHAIR

Cheryl Fraser, Chair, Board of Governors

BOARD-APPOINTED MEMBERS

Cassandra Dorrington
Level Chan
Catherine MacPherson
Paul Beesley
Kristan Hines

NON-BOARD APPOINTED MEMBERS

Senate-appointed members

Dr. Louise Spiteri, Professor of Information Management & Chair, Dalhousie Senate

Dr. Graham Gagnon, Dean of Architecture and Planning

Dr. Hany el Nagggar, Professor & Associate Dean, Faculty of Graduate Studies

Dalhousie Student Union appointed member

Aparna Mohan, Dalhousie Student Union President

Staff member

Matt Hebb, Vice-President Government and Global Relations

Dalhousie inspires our diverse community to serve Nova Scotia, Canada, and the world through innovative and impactful teaching and research, world-class scholarship, a passion for learning, and a deep sense of social responsibility.



APPENDIX B – SUBMISSION FORM

1. Proponent's Information

Please fill out the following form, naming one person to be the Proponent's contact for the Open Call process and for any clarifications or communication that might be necessary.	
Full Legal Name of Proponent:	Perrett Laver Inc.
Any Other Relevant Name under which Proponent Carries on Business:	Perrett Laver
Street Address:	1021 West Hastings Street, Floor 9
City, Province/State:	Vancouver, BC
Postal Code:	V6E 0C3
Phone Number:	604-340-7004
Fax Number:	n.a.
Company Website (if any):	https://perrettlaver.com/
Proponent's Contact Name and Title:	Dr. Gordon Lobay, Regional Managing Partner, Americas
Proponent's Contact Phone:	604-358-7113
Proponent's Contact Fax:	n.a.
Proponent's Contact Email:	gordon.lobay@perrettlaver.com

2. Offer

The Proponent has carefully examined the Open Call documents and has a clear and comprehensive knowledge of the Deliverables required under the Open Call. By submitting a Proposal, the Proponent agrees and consents to the terms, conditions and provisions of the Open Call, including the Form of Agreement, and offers to provide the Deliverables in accordance therewith at the rates set out in the pricing section.

3. Rates

The Proponent has submitted its rates in accordance with the instructions in the Open Call. The Proponent confirms that it has factored all of the provisions of Appendix A, including insurance and indemnity requirements, into its pricing assumptions and calculations.

4. Addenda

The bidder is deemed to have read and accepted all addenda issued by the Owner. The onus is on bidders to make any necessary amendments to their bids based on the addenda. The bidder is required to confirm that it has received all addenda by listing the addenda numbers on the following line: **(For example, if Addendum 1 has been issued, enter 1 on the line. If there are two addenda, enter 1, 2.)** ___none___. Bidders who fail to complete this section will be deemed to have not received all posted addenda and shall be deemed **non-compliant**.

5. No Prohibited Conduct

The Proponent declares that it has not engaged in any conduct prohibited by this Open Call.

6. Disclosure of Information

The Proponent hereby agrees that any information provided in this Proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The Proponent hereby consents to the disclosure, on a confidential basis, of this Proposal by the Owner to the advisers retained by the Owner to advise or assist with the Open Call process, including with respect to the evaluation of this Proposal.

7. Proposal Irrevocable

The Proponent agrees that its proposal shall be irrevocable for a period of **90** days following the Submission Deadline.

8. Required Signatures

Failure to submit this signature section will render the Proposal NON-COMPLIANT and the Proposal will be disqualified.

Dr. Gordon Lobay

s. 40 (1)

Name of Proponent's Representative

Regional Managing Partner, Americas

Title of Proponent's Representative

May 14, 2024

Date

I have the authority to bind the Proponent.

IN SIGNING THIS PAGE AND SUBMITTING YOUR PROPOSAL, THE PROPONENT ACKNOWLEDGES HAVING READ AND UNDERSTOOD AND AGREED TO THE TERMS AND CONDITIONS OF THIS DOCUMENT.