



March 13, 2021

To: Plymouth District Library Personnel Committee
From: Carol Souchock, Plymouth District Library Director
Robyn Lowenstein, HR and Business Administrator
Personnel Committee

Re: Executive Hiring Firm

After investigating Executive Hiring Firms that specialize in assisting libraries in hiring new directors Robyn and I contacted the following three organizations:

Bradbury Miller Associates:
<http://bradburymiller.com/>
Canton, Ohio

John Keister and Associates:
<https://www.johnkeister.com/>
Chicago area

Mortimore Consulting, LLC
Brian Mortimore, Kent District Library Director of Human Resources
Rockford, Michigan

Robyn and I conducted interviews with John Keister and Brian Mortimore to introduce them to our library and learn more about each of their firms and the process they provide. Bradbury was not available to conduct an interview this past week.

The Personnel Committee met on March 13, 2021 and recommended that we invite Brian Mortimore from Mortimore Consulting to attend our March board meeting and introduce himself and his firm’s process to the board. Attached you will find a biographical overview and proposal from Mortimore Consulting.

Mortimore’s proposal includes the following costs:

Base Fee	\$15,000
Option B – Facilitation of interview, selection and closing process	\$2,000

Additional expenses will be required to complete this process. Mortimore’s proposal does not include providing a background check. I recommend that the board conduct a pre-employment investigation for the final candidate.

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This could include verification of credentials and an examination of professional, personal, financial and criminal records. An additional fee for this service will be required. I will look into the pricing for this service but for now, I am estimating this cost not to exceed \$2,500.

Other expenses may include advertising the posting and travel reimbursement for final candidates. Estimated costs for advertising are \$500. For budgeting purposes I suggest we also include \$500 for travel reimbursement for candidates.

Therefore total costs are expected to be \$20,500.

The following internal budget adjustment, which does not require board approval, will cover the costs of these expenses:

Expenditure	VEBA Payments	-\$20,500
Expenditure	Contracting	\$20,000
Expenditure	Transportation	\$ 500

RESOLVED BY _____, SECONDED BY _____, TO HIRE MORTIMORE CONSULTANTING, LLC. TO FACILIAE THE HIRING OF A NEW DIRECTOR.
AYES _____ NAYS _____

Mortimore Consulting, LLC

March 4, 2021

Proposal

This Statement of Work details the type and extent of the services proposed by Brian Mortimore (Mortimore Consulting, LLC) to provide for a director search on behalf of the Plymouth District Library Board of Trustees. Brian will work primarily with one or more designated members of the Personnel Search Committee.

EXECUTIVE SUMMARY

Carol Souchock requested a proposal for assistance from Brian L. Mortimore, SPHR, to facilitate a search for a library director.

Brian Mortimore has over 25 years of experience directing HR functions and has experience managing library director searches, addressing labor relations, labor negotiations (UAW, Teamsters, MEA, SEIU, AFSME), compensation reviews, job analysis, employee dispute resolution, performance management, at-will and just-cause discharge, leadership coaching, HRIS, benefit design/management, pension/retirement plan administration, staffing design, executive searches, and has been published on HR-related topics. Brian serves as the Director of Human Resources and Organizational Development for Kent District Library and consults on human resource matters, training library leaders throughout the Midwest. Recently Brian collaborated with industrial organizational psychologists and convened over five-hundred library workers throughout the United States and Canada to participate in research that led to the library industry's first employment assessment screening tool (see *BookmarkHR.com*) contributing to his being named a 2020 "Mover and Shaker" by Library Journal. Brian has been with KDL for 18 years and has helped lead the organization to be named one of the Best & Brightest Companies to Work For in 2019 in both West Michigan and National categories. Brian holds a Master's Degree in Organizational Communications and Human Resources Management from Michigan State University, certifications from the Society of Human Resource Management, MSU's School of Labor and Industrial Relations, and is a registered leadership consultant with Management Research Group in Portland Maine.

SCOPE OF WORK

The services delivered under this SOW include the following:

1) Project Kick-Off Meeting: Consultant will meet with the Board of Trustees to glean insights and feedback which will enable the development of a target candidate profile.

2) Refinement of the job posting: This document will be used for circulation to prospective candidates.

3) Searching: Using active search techniques, consultant will network through social media to discover and encourage passive job seekers who are reflected in the target candidate profile.

4) Phone Intake Interviews: Consultant will conduct phone intake interviews to establish qualifications of high potential candidates and compile written summaries for review by the search committee.

5) Presentation of Candidate Portfolios: Consultant will meet with the Board of Trustees (i.e., designated Search Committee) to share candidate portfolios and make recommendations for next steps towards selection.

Following the above, the client is anticipated to have a field of qualified candidates for which to conduct 1) informal 'meet & greet' style meetings, followed by, 2) formal interviews and selection.

6) Interview Agenda and Questions Design: Consultant will develop a sample agenda, along with interview questions for the Trustees to use in their informal meetings and formal interviews. These questions will reflect the strategic needs of the library and will be approved by the Personnel Search Committee.

Part B.) Interview Facilitation: Consultant can provide on-site interview facilitation and support the offer/closing of the search in support of the Trustees' decision-making process as part B. of the contract if elected by the Board.

Consultant will meet via phone/teleconference, with the search committee and meet with the entire Board at the beginning and end of the engagement or as deemed necessary.

PROJECT EXECUTION

All work will be conducted remotely unless otherwise noted.

Work will be billed at 50% upon execution of contract with the balance being billed upon completion. Payment terms are net 30 days.

The consultant assumes no liability. No work will be considered as legal advice and the library indemnifies the consultant and acknowledges this by signing below. No other services are included in this statement of work unless agreed in writing by both parties and attached to this document and either party may cancel future work/services at any time if necessary for any reason with written notice to the other. Should the process not reach its natural completion following the first effort, additional search fees may apply and would be agreed upon by both parties before proceeding. (Note: such an event would be rare, far from the norm, and is not anticipated.)

PAYMENT INFORMATION

EMPLOYER INFORMATION	
Billing Information	Site Information
Company: Plymouth District Library	Company: SAME
Address: 223 S. Main St. Plymouth, MI 48170	Address: SAME
Contact: Robyn Lowenstein	Contact: SAME
Phone: 734-453-0750	Phone:
Fax:	Fax:
Email:	Email:

Price, Payment & Delivery

PRICE, PAYMENT & DELIVERY	
Fee Structure:	<p>Fees will be billed upon execution of the statement of work.</p> <p>The parties agree that the library is responsible for all forms of insurance and liability.</p> <p>Fees are \$15,000 with 50% down and the balance paid upon completion of work. Should the search process not reach its normal conclusion within a reasonable period of time, the parties</p>

	<p>may consider appropriate fees for additional work.</p> <p>Optional 'Part B': If the board seeks to have Brian provide facilitation of the interview, selection, and closing process, fees are \$2,000 with no additional billings, payable following completion of the interview event.</p>
Payment Terms:	Net 30
Travel and Expenses	N/A

AUTHORIZATION

Mortimore Consulting:

Signed By:

Brian L. Mortimore

Plymouth District Library

Signed by:

Print Name:

Title

Date

Please scan and send one signed copy of this Statement of Work to Brian Mortimore at; blmortimore@hotmail.com. Brian will return a signed copy.

Mortimore Consulting

Library Director Recruitment

Your Library Director Recruiters are Peggy Olson and Brian Mortimore. Together, Peggy and Brian have worked to simplify the director search process for Library Trustees when on that rare occasion they are tasked with finding just the right leader to guide their library into the future. As their bio's share below, both Peggy and Brian combine their unique skills, insights, and expertise in library and hospitality management industries to help attract highly qualified candidates through active search methods and have done so successfully for numerous library boards throughout Michigan. Working together, they have facilitated director searches with excellent results at significant savings over other search firms and are happy to consider your unique needs and position you to select your next Library Director.



Olson HR Solutions provides Human Resources services including Executive Search, for a variety of clients and industries. Our highly personal and interactive interview process allows us to share with you the things that the resume doesn't tell you. We pride ourselves on giving you the insight into the candidate you need, along with their work history and education. We listen to you and work with you to determine the profile for the ideal hiring decision.

We've been working in the Library Director space since 2015 and have completed eight searches. Our ability to virtually meet with the Board Members has opened up new insight into the collective group that will ultimately interview finalists. Our Executive Search process includes candidate profiles in an informed and detailed packet, including a questionnaire that the candidate completes to show you their ability to write effectively and professionally, while also answering the questions. We present, facilitate interview scheduling if necessary, and assist with the closing process.



Olson HR Solutions

Principal, Managing Director *Olson HR Solutions* was originally designed around the hospitality industry. Its founder, Peggy Olson, has over 25 years of experience in both hospitality operations and executive leadership roles. She has held the titles of General Manager, Manager of Organizational Planning and Development, Executive Director of Human Resources and Vice

President of Hospitality Search. Through her experience in working with both the individual and

with a team, Peggy has developed and honed her methods of assessing and coaching a wide variety of situations and persons. To those who have worked with Peggy either on property or as an Executive Recruiter, her style of seeing people in their entirety is key to maximizing their development as well as the organization they are a part of.

Through her integrity and unique approach, Peggy brings a highly personal style to working an Executive Search. She has expertise that comes from experience, and a candor and professionalism that yields unbeatable results. While Peggy is currently the managing partner of a hospitality search firm, she maintains a private exclusive search firm, Olson HR Solutions, which only works on unique projects outside of hospitality.

Peggy and her partner John live in White Bear Lake Minnesota and enjoy time with her two adult daughters and three adorable grandchildren.



Mortimore Consulting, LLC

Owner, Principal *Brian L. Mortimore, SPHR of Mortimore Consulting* has over 25 years of experience directing Human Resources functions and has experience addressing labor relations, labor negotiations (UAW, Teamsters, MEA, SEIU, AFSME) compensation reviews, job analysis, employee dispute resolution, performance management, at-will and just-cause discharge, leadership coaching, HRIS, benefit design/management, pension/retirement plan administration, staffing design, executive searches, and has been published on HR-related topics in Public

Library Magazine, and Library Journal. Brian serves as the Director of Human Resources and Organizational Development for the Kent District Library and consults on human resources and trains library leaders throughout the Midwest. Recently Brian collaborated with industrial organizational psychologists and convened over five hundred library workers throughout the United States and Canada to participate in research that led to the library industry's first employment assessment screening tool (see BookmarkHR.com) contributing to his being named a 2020 "Mover and Shaker" by Library Journal. Brian holds a master's degree in organizational communications and Human Resources Management from Michigan State University, certifications from the Society of Human Resource Management, MSU's School of Labor and Industrial Relations, and is a registered leadership consultant with Management Research Group in Portland Maine. Brian resides in Rockford Michigan with his wife and four children.

To learn more about Mortimore Consulting, and specifically Library projects or searches, please email Brian at blmortimore@hotmail.com.