



CITY *of* BRISBANE

City Council Special Meeting Agenda

Thursday, July 6, 2023 at 6:00 PM • Hybrid Meeting, 50 Park Place, Brisbane, CA 94005

The public may observe/participate in City Council meetings using remote public comment options or attending in person. Members of the City Council shall attend in person unless remote participation is permitted by law. The City Council may take action on any item listed in the agenda.

TO ADDRESS THE COUNCIL IN PERSON

Location: 50 Park Place, Brisbane, CA 94005, Large Conference Room

Masking is not required, but the California Department of Public Health recommends people at higher risk for severe illness consider masking. Similarly, to help maintain public health and safety, we respectfully request that people not attend public meetings in-person if they are experiencing symptoms associated with COVID-19 or are otherwise ill and likely contagious (e.g., respiratory illnesses).

To address the City Council on any item – whether on the posted agenda or not – please fill out a Request to Speak Form located in the Community Meeting Room Lobby and submit it to the City Clerk. Speakers are not required to submit their name or address.

REMOTE PARTICIPATION

Members of the public may participate in the Special Meeting by logging into the Zoom Meeting listed below.

The agenda materials may be viewed online at [brisbaneca.org](https://www.brisbaneca.org) at least 72 hours prior to a Regular Meeting, and at least 24 hours prior to a Special Meeting.

Remote Public Comments:

Remote meeting participants may address the City Council during public comment. We also encourage you to submit public comments in writing in advance of a meeting. Aside from commenting personally while in the Zoom Meeting, the following email and text line will be also monitored during the meeting and public comments received will be noted for the record during Public Comment.

Email: ipadilla@brisbaneca.org or **Text:** (628) 219-2922

Join Zoom Meeting: [zoom.us](https://zoom.us/j/85031706803) (please use the latest version: zoom.us/download)

<https://us06web.zoom.us/j/85031706803>

Meeting ID: 850 3170 6803

Call In Number: 1 (669) 900 9128

Note: Callers dial *9 to “raise hand” and dial *6 to mute/unmute.

SPECIAL ASSISTANCE

If you need special assistance to participate in this meeting, please contact the City Clerk at (415) 508- 2113. Notification in advance of the meeting will enable the City to make reasonable arrangements to ensure accessibility to this meeting.

6:00 P.M. CALL SPECIAL MEETING TO ORDER

- A. Consider any request of a City Councilmember to attend the meeting remotely under the “Emergency Circumstances” of AB 2449
- B. Public Comment
- C. Interviews of Executive Search Firms
- D. Consider Selection of Executive Search Firm to recruit the for the position of the City Manager

ADJOURNMENT

File Attachments for Item:

C. Interviews of Executive Search Firms



June 21, 2023

Abby Partin, HR Administrator
City of Brisbane
50 Park Place
Brisbane, CA 94005

Dear Ms. Partin:

Thank you for the opportunity to submit our recruitment proposal for the position of City Manager for the City of Brisbane. We feel well suited to fulfill your executive search requirements based on our track record of successful recruitments, our service approach, and overall recruitment expertise.

We take great pride in providing our clients exceptional service and excellent results. And we feel well suited to support your city on this search. During the past 24 months, we have completed City Manager assignments for the cities of Chico, Pleasanton, Sand City, Cupertino, Yreka, Tulare, Ross, Paso Robles, Sausalito, and Fowler. Overall, in the past five years our firm has completed 29 city manager assignments. These include the cities of Stockton, Simi Valley, Hawthorne, Whittier, Port Hueneme, Pinole, Anaheim, Fremont, Vallejo, Hermosa Beach, Martinez, Half Moon Bay, Visalia, Fullerton, Redding, South El Monte, Monte Sereno, Benicia, and Beaumont. We feel the contacts made from these assignments would be highly beneficial to this search and your overall recruitment needs.

Below is the location and phone numbers of the office which will coordinate this activity along with the contacts and authorized representatives of Avery Associates:

Bill Avery
16 Lyndon Ave., Suite 200
Los Gatos, CA 95030
(office) 408 399-4424
(cell) 408 472-7873
(email) bill@averyassoc.net

Paul Kimura, Principal
16 Lyndon Ave., Suite 200
Los Gatos, CA 95030
(office) 408 399-4424
(cell) 408 472-7936
(email) paulk@averyassoc.net

Our extensive database of executives in municipal and county government provides an excellent foundation for the outreach efforts we describe in our proposal. We've also had extensive interaction with City Councils, City Managers and Assistant City Managers based on our labor relations practice. All these contacts would be an excellent resource in support of this recruitment.

William Avery & Associates, Inc.
Consultants to Management

16 Lyndon Ave., Suite 200
Los Gatos, CA 95030
408.399.4424
Fax: 408.399.4423
www.averyassoc.net

Following review of our proposal, it is our hope that our overall portfolio of successful recruitments, our professionalism, and the positive results we have delivered for our clients will provide the basis for selection of our firm. This proposal of recruitment services contains the following information:

- Company Overview
- Firm Qualifications/Experience
- Recruitment Team
- Recruitment Approach/Methodology
- Timeline
- Consulting Fee
- Guarantees & Ethics
- Principal Profiles

Thank you for the opportunity to be considered for this recruitment. If you have any questions, please do not hesitate to call me at 408-399-4424

Sincerely,



William H. Avery

WHA:jmc



PROPOSAL FOR THE CITY OF BRISBANE RECRUITMENT FOR CITY MANAGER

William Avery & Associates, Inc. – Overview

William Avery & Associates, Inc. (Avery Associates) is a successful and service focused Management Consulting firm based in Los Gatos, California. Incorporated in 1982, the firm specializes in Executive Search, Labor Relations, and Human Resources/Management Consulting.

The firm currently includes two Principals and several key consultants. Bill Avery, the founder of Avery Associates, heads, and manages the firm. He oversees the Labor Relations practice and is heavily involved in the search business including leading key searches. Paul Kimura focuses on and manages the Executive Search and Recruitment practice. Key staff members include Bill Lopez and Kristi Ward, who support the search practice and the firm's administrative staff includes Tomi Ewing and Jackie Collins. Temporary staff as needed augments the team.

Mr. Avery, having served in the past as a City Manager, provides the firm with direct experience and knowledge of city administration. Mr. Kimura's expertise in executive, technical and business recruitment, which he gained during his nineteen years of high technology experience, provides the basis for many of the recruitment strategies and tactics utilized by the firm. (Their profiles are attached.) Collectively and combined, the firms Principals offer exceptional expertise in public sector recruitment and consulting.

Firm Qualifications/Experience – What Differentiates Avery Associates

Exceptional service delivery and a very high-quality work product provide excellent results for our clients. This begins with the initial client meetings, which lead to detailed timelines for deliverables followed by weekly recruitment status updates following initiation of the search. Our candidate outreach efforts are professionally and confidentially conducted. The evaluation materials we provide clients are routinely characterized as accurate, comprehensive and of very high quality. We believe more so than any other public sector recruitment firm. This is largely based on our interview system utilizing behavioral interview techniques, which we describe in our recruitment plan. This leads to a quality product with excellent end results for our clients.

The service element is based on two factors: The first is the collective service philosophy from all our organizational team members. They are each dedicated to providing service and support to clients. The second factor is based on the high level of engagement and participation from the firm Principals in every search assignment. This hands-on involvement includes client interface, identifying and developing the ideal candidate profile and position specification, development of the search strategy, candidate outreach, interviewing and assessment, completion of reference interviews, candidate presentation, final interview facilitation and when desired, negotiation of employment terms with the successful candidate.



Recruitment Team for the City of Brisbane

Bill Avery will serve as the Project Lead for this assignment and will be assisted by Bill Lopez and Kristi Ward. Mr. Avery will be personally involved in the initial client meetings, development of the ideal candidate profile and search strategy, interviewing and assessment of candidates, the presentation of candidates, attendance at final interviews and will be available throughout the search process to provide other related consulting services.

Recruitment Approach/Methodology

I. Position Profile and Organizational Assessment

The initial assessment phase is a critical component of the search process. Mr. Avery will individually meet with City Council members, and with other city staff (as deemed appropriate by the policy makers) to discuss the organizational needs and position requirements and to formalize the recruitment job announcement.

We understand that some communities are committed to engaging their residents in determining the ideal profile for the new City Manager. If this is a priority for the City, we can utilize various approaches in reaching out to the community in soliciting their insights/inputs regarding the ideal City Manager. The ideal approach towards reaching the greatest number of residents is through an online community survey linked through your city's website. Alternative options include A town hall meeting (in today's environment, this would be conducted via video conferencing); conducting a "targeted" outreach effort to key community members as identified by the City Council (i.e., Service club/Chamber of Commerce/Downtown Association leaders; educational executives; homeowners association leaders; executives of community-based organizations). Any or all of these community outreach efforts can be incorporated into our recruitment model. We will include the Council's preferred approach as part of our Scope of Services at no additional charge.

Our goals in securing the collective insights from our meetings are to:

- Understand the City priorities for this position.
- Develop a clear understanding and consensus on the expertise, experience, education, performance attributes and operational style of the ideal candidate.
- Discuss the goals, objectives, deliverables, and challenges related to this position.
- Gain insight of the various organizational dynamics and departmental issues that exist within the organization.
- Identify the compelling aspects to this opportunity.

The formal recruitment announcement that includes the ideal candidate profile would be developed from the above discussions and incorporated into the formal position



announcement. The candidate profile is also utilized in various other means as a marketing tool, for advertising copy, postings, and for other announcements.

II. Development of the Search Strategy

Our search strategy will be developed in conjunction with the organizational assessment. The final approach is based on your input and considerations during the assessment activity. We would incorporate the following elements into this search:

- Original research, which consists of identification and contact of current incumbents or other candidates who meet the profile but are not actively seeking other employment.
- Development of a targeted candidate list based on our extensive database of key executive contacts, referrals and recommendations from key sources, and other current and former City Management personnel who have extensive contacts and networks in this area. We also make extensive use of Linked-In Recruiter and email/phone contact in our proactive outreach efforts to solicit interest from potential candidates.
- Public information sources that include various membership listings such as the League of California Cities, ICMA and the various municipal organizations within the U.S.
- An extensive mailing campaign to current city managers and select assistant managers throughout the U.S.
- Print advertising in ICMA Newsletter, Jobs Available and any other print publications deemed appropriate by the City.
- Internet job postings on national public sector employment bulletin boards, City Management and Municipal association-based web sites, and our company website.

III. Candidate Assessment

Our assessment process involves several “tiers” of evaluation. All candidates responding to this position will initially be evaluated based on their resume and if appropriate, an extensive phone “screening” by a member of the project team. Candidates who pass the initial “qualifying” criteria are then scheduled for a formal interview with Mr. Avery. These extended personal interviews typically take one hour and a thorough discussion of their experience, accomplishments, management philosophy and interpersonal style takes place.

In interviewing candidates, we utilize a methodology based on “behavioral” interview techniques. Fundamentally, this approach explores a candidate’s past accomplishments and experiences that relate to the position being considered. The philosophy here is that the best indicator of future performance is to evaluate past behavior. This methodology allows the firm to “project” how a candidate would approach and address the key challenges in the new position.



Those individuals who best fit the position requirements will have a Candidate Assessment Report developed by the Principal who conducted the interview. Additionally, two initial reference interviews are performed on these candidates. The reference interviews provide our clients with additional insights on the candidate's "behavior" and style.

IV. Candidate Presentation

Upon completion of formal interviews, a selection of candidates for presentation is made. We feel our extensive qualification, interview, and reference interviewing process and the knowledge gained during our initial assessment period; enable our client to proceed with fewer rather than more finalists. However, we will not restrict or limit the number of candidates recommended as this decision is related to the overall strength and depth of the candidate pool.

The final candidates are presented in our extensive candidate presentation "book". Each finalist will have a file consisting of a candidate summary sheet, the submitted cover letter and resume, the Candidate Assessment Report (based on the "behavioral" interview), and two candidate reference interviews. This extensive profile on each recommended candidate continually generates positive feedback from our clients as it provides extensive detail beyond just a resume.

The Candidate book also identifies other candidates who were given secondary consideration, which provides the client insight on others who were interviewed. Candidate summary sheets are created for everyone who submitted a resume would also be included. This provides the client an insight to the level and nature of response for their position.

V. Selection Process

Once the final candidate interview group is identified, we will assist in the structuring of the interview process and coordinate the interview scheduling activity. Our firm will also provide candidates with guidance related to travel planning, hotel accommodations, as well as other interview planning issues. Our firm will also develop potential interview questions and be in attendance during final interviews to help facilitate the process and to lead an end of day debrief and evaluation process.

VI. Position Closure and Follow-Up

Based on the firm's experience in human resource management and executive search, we can assist our clients in formulating appropriate compensation and other employment arrangements. We will be available throughout our retention to assist in this process.

As a matter of policy, Avery Associates monitors the transition and progress of any executive we place with a client. Within the first three to six months following the hired individual



joining the City, we will speak with that individual to ensure the transition has effectively occurred. During the same period, we will also review the individual's status with your office.

Recruitment Timeline

Task	Scheduled Dates
<i>Search Initiation, Marketing & Advertising Development:</i> <ul style="list-style-type: none"> ▪ <i>Initial meetings with city manager and city staff to define the ideal candidate profile.</i> ▪ <i>Develop draft of recruitment brochure for approval by client</i> ▪ <i>Recruitment strategy finalized.</i> ▪ <i>Determination of advertising scope and placement deadlines</i> ▪ <i>Brochure designed and printed</i> 	<i>Weeks 1 - 4</i>
<i>Marketing, Advertisement and Outreach Period:</i> <ul style="list-style-type: none"> ▪ <i>Mailing of brochures</i> ▪ <i>Jobs Available</i> ▪ <i>ICMA newsletter and website</i> <i>Preliminary candidate screening</i>	<i>Weeks 4 - 10</i>
<i>Candidate Review - Screening and Finalists Selection</i>	<i>Weeks 9-12</i>
<i>Development and finalization of Interview process and interview questions</i>	<i>Weeks 13-14</i>
<i>Interviews with City</i>	<i>Week 15</i>
<i>Final interviews and reference checks</i>	<i>Week 16</i>
<i>Appointment Offer/Acceptance</i>	<i>Week >17</i>
<i>Report to Work Date</i>	<i>Week >17</i>

Consulting Fee

Based on the services described in our proposal, the professional services consulting fee for this recruitment will be \$19,400. We would provide our first consulting invoice in the amount of \$8,400 at the outset of the search. A second invoice of \$5,500 would be billed with the presentation of candidate recommendations and the final invoice of \$5,500 for the retainer will be submitted at the completion of the search. The consulting fee will be inclusive of all services defined within this proposal unless otherwise stated.

In addition to the Professional Services Fee, normal and direct out-of-pocket expenses associated with the search are charged back to the client. Expenses for this assignment would not exceed \$6,500 without the express consent of the City. These expenses include advertising, clerical time, supplies, printing, telephone, postage, background checks and consultant travel for client discussions, meetings, local and out-of-area candidate interviews. All expense items are reimbursed "at cost" and will be detailed and billed monthly.



Guarantees and Ethics

Whenever William Avery & Associates, Inc. is retained; we make several guarantees and commitments to a client. Due to our experience, knowledge, and success within the management-consulting field, we assure a client that we will only present candidates who meet a substantial majority of the ideal qualifications that you have outlined. We are also committed to continue our search efforts until a successful candidate is employed.

During our placement efforts, we openly share any relationships, previous experience, and knowledge for any candidate we present for consideration. Our commitment and responsibility are to our clients and their best interests.

It is also our practice to replace a candidate who may voluntarily resign during the first year of his/her employment. This same commitment applies if the client finds it necessary to terminate or to request the resignation of the selected individual in the first year for any reason. In either case, we invoice a client only for out-of-pocket expenses incurred in identifying a replacement.



Avery Profile

William Avery

William Avery founded his successful management consulting firm in 1981. He has directed William Avery & Associates in service as a Labor Relations and Executive Search consultancy, serving personally as a chief negotiator, trainer, and representative in grievance and disciplinary matters.

A specialist and widely recognized expert in employer-employee relations, he has served as a City Manager (Los Gatos) and Assistant City Manager. While City Manager, he was President of the Santa Clara County City Manager's Association and Chair of the County Employee Relations Service.

Bill has lectured at De Anza College, San Jose State University, and Stanford University, and regularly makes presentations for the League of California Cities, CALPELRA, and other public sector organizations.

Building on his personal track record of success, he expanded the firm's focus to include increased emphasis on public and private sector search. He added proven industry professionals with expertise in these areas. The result has been to create an exceptionally strong management consulting firm, now known as Avery Associates, with the expertise to provide the full range of services required for successful public or private sector executive search.

A key measure of the firm's success has been the many long-term relationships that he and his staff have established with clients.

Bill holds B.A. in Political Science and an MPA from San Jose State University, where he was graduated with highest honors.



Avery Profile

Paul Kimura

Paul Kimura brings a unique combination of recruitment and business experience to Avery clients.

Paul is involved in leading Avery's public sector professional searches. He has been both a corporate recruitment director and HR director for several high technology companies, ranging from Fortune 500 firms such as Novell and National Semiconductor to a Silicon Valley start-up. His proven recruitment and HR generalist skills help him bring forward the best available candidates and properly assess their skills and "fit" with client organizations.

Indeed, many of the recruitment strategies and tactics incorporated into the Avery search process are a direct result of Paul's extensive recruitment experience in the high technology industry.

Paul has been a successful HR consultant, guiding clients through all aspects of Human Resources functions — compensation & benefits, employee and management training, performance management, and termination issues.

He is skilled in areas such as strategic planning, executive coaching, separation negotiation, and organizational assessment and design. It's another service that Avery Associates can offer its clients because of the unique background of its principals — and Paul's extended skill set in Human Resources underscores the fact that Avery professionals "have been there" and understand your needs from a personal perspective.

Paul holds a B.S. degree in Business Administration from San Jose State University. He is active in professional HR organizations and in the community, where he has worked with a number of education, youth service, civic, business, and cultural organizations.

"Just as Avery looks to form long-lasting relationships with its clients, I believe in making the same commitments within my community."





A Proposal to Conduct an Executive Recruitment
for the Position of
CITY MANAGER
on behalf of the
CITY OF



1544 Eureka Road, Suite 280
Roseville, CA 95661
(916) 784-9080
(916) 784-1985 fax

June 15, 2023

CITY COUNCIL
CITY OF BRISBANE
BRISBANE CITY HALL
50 PARK PLACE
BRISBANE, CALIFORNIA 94005

Dear Members of the City Council:

Bob Murray & Associates is pleased to submit a proposal to conduct the City Manager recruitment for the City of Brisbane. The following details our qualifications and describes our systematic—yet flexible—method of identifying, recruiting, and screening outstanding candidates on your behalf. It also includes a proposed budget, timeline, and guarantee.

At Bob Murray & Associates, we pride ourselves on providing quality service to local governments, non-profit agencies, and private firms by capitalizing on our decades of experience and vast network of contacts. As a minority and woman owned firm, Bob Murray & Associates' places diversity, equity, and inclusion at the forefront of each recruitment. We recognize the importance of meeting each client's unique recruitment needs and building a plan together to establish success. Our expertise ensures that the candidates we present to the City of Brisbane will match the criteria you have established, be a positive addition to your organization, and be outstanding in their field.

Bob Murray & Associates recognizes that we work at the pleasure of the City Council and our job is to facilitate the Council in finding the City of Brisbane's next City Manager. Our best practice is to establish a strong partnership with the Council, to ensure the placement of a City Manager who is ideally suited to its needs. In developing this collaborative approach, we will seek the opportunity to meet with the Council individually to discuss their expectations for the City of Brisbane's new City Manager. The feedback received from Council will be essential in providing guidance when recruiting and screening candidates for the position.

With respect to the City Manager recruitment and the City of Brisbane, Bob Murray & Associates has placed over 200 City Managers since our firm's inception in 2000. We are currently conducting City Manager recruitments on behalf of the California cities of Desert Hot Springs, Merced, San Marino, San Ramon, South Gate, Ventura, and Winters. Our extensive contacts and knowledge of outstanding candidates will ensure you have a quality group of finalists from which to select the City of Brisbane's next City Manager.

Recent City Manager recruitments we have completed similar in size and scope to your upcoming search include the following:

2023

Auburn, CA
Gonzales, CA
Clayton, CA
Downey, CA

Moraga, CA (Town Manager)
Piedmont, CA (City Administrator)
Rio Vista, CA
San Bruno, CA
San Rafael, CA

Santa Clara, CA
Yountville, CA

2022

Calistoga, CA
Monterey County, CA (County Administrative Officer)
Livermore, CA
Placer County, CA (County Executive Officer)
Rohnert Park, CA
St. Helena, CA
Sonoma County, CA (County Administrator)
Yolo County, CA (County Administrator)

2021

Carpinteria, CA (Assistant City Manager)
Cathedral City, CA (Assistant City Manager)
Cudahy, CA

Gridley, CA (City Administrator)
Irvine, CA
Laguna Beach, CA
Los Altos Hills, CA
Los Banos, CA
Marion, IA (Deputy City Manager)
Mt. Shasta, CA
Orinda, CA
San Carlos, CA (Assistant City Manager)
San Clemente, CA
Santa Barbara, CA (Assistant City Administrator)
Scotts Valley, CA
Selma, CA
Sonoma, CA
South Pasadena, CA
Willits, CA

We work as a team on every search at Bob Murray & Associates. Your Project Lead would be Gary Phillips, who conducts a majority of our City Manager and Assistant City Manager recruitments. Mr. Phillips is highly experienced in guiding elected bodies through the decision-making process and would not only direct and supervise the project team from beginning to end but also serve as your Recruiter.

To learn first-hand of the quality of our services and why the majority of our engagements come from repeat and referred clients, we invite you to contact the references listed on page 17 of the attached proposal.

We look forward to your favorable consideration of our qualifications. Please do not hesitate to contact us at (916) 784-9080 with any questions.

Sincerely,

Valerie Gatta Phillips

Gary Phillips
President, Bob Murray & Associates

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THE RECRUITMENT PROCESS

Bob Murray & Associates' recruiters are specialists in finding a positive placement, providing security and fairness to candidates and clients while ensuring the integrity of the search process. We understand that superlative recruiting for the City Manager will lead to superlative results for the City of Brisbane. Outlined below are the steps in our proven recruitment process, refined through our 30+ years of experience in executive search.

STEP 1 DEVELOP THE CANDIDATE PROFILE

Our understanding of the City of Brisbane's needs will be key to a successful search. Gary Phillips will meet with the City Council and key stakeholders to learn as much as possible about the ideal candidate for the City Manager position. We want to become familiar with the values and culture of the organization, as well as to understand the current and future issues, challenges, and opportunities in the City of Brisbane.

Mr. Phillips will review and help define the City's wish-list regarding the ideal candidate's personality, management style, knowledge, skills, and abilities and will work with the City to identify expectations regarding education and experience. The City Council and Mr. Phillips will discuss compensation, benefits, and other key information necessary to ensure that outstanding candidates are attracted to this opportunity. The profile we develop together at this stage will drive subsequent recruitment efforts.

Optional Service: Community and Staff Involvement

We find that many of our clients value a recruitment process that opens the opportunity for community members, business leaders, organization representatives, and employees to provide input regarding the ideal candidate. Our recruiters are skilled in designing and facilitating forums, town hall meetings, and online surveys that allow equitable involvement from a variety of constituencies and in consolidating feedback into a cohesive narrative of common themes.

If the City of Brisbane desires, we will work with the City Council to create a customized community and/or staff input process.

STEP 2 DESIGN/DISTRIBUTE BROCHURE AND ADVERTISEMENTS

Mr. Phillips and your dedicated Recruitment Coordinator will use the candidate profile developed with the City of Brisbane to create a professional recruitment brochure, with the assistance of our professional graphic designer. The four-page, full-color brochure will describe the community, organization, position, ideal candidate, and compensation and will include pictures provided by the City of Brisbane that you feel best represent your organization and your community.

Upon your approval, Mr. Phillips will send the brochure by postal mail and email to a targeted audience, personally inviting potential candidates to apply for the City Manager position. We will also place the recruitment brochure on our website, which attracts over 11,000 unique hits weekly and is a trusted resource for candidates seeking executive and professional positions. Two sample brochures are included in this proposal package for your reference.

Mr. Phillips will also design an effective advertising campaign appropriate for the City Manager recruitment. Our broadest outreach comes through our active social media involvement on Facebook, LinkedIn, and Twitter, where upcoming and current positions are posted. Sources such as *Western City Magazine*, PublicCEO, and the Careers in Government website will be used to reach an extensive local government audience, while position-specific postings will be chosen to attract candidates who have built their careers in and are committed to the City Manager field.

Suggested City Manager-specific advertising sources for the City of Brisbane's search include:

- ICMA Newsletter
- California City Management Foundation
- League of Women in Government
- California City News

Bob Murray & Associates does not typically place ads with job aggregators or general job posting sites such as CareerBuilder, Monster, or Indeed, as we have found that the broad reach of these sites does not necessarily lead to quality candidates for executive and professional positions.

Reaching Diverse Candidates

Bob Murray & Associates, a woman- and minority-owned business, is proud of its commitment to attracting and placing diverse candidates. Not only do we place advertisements with websites designed to attract minority and female candidates, but our President, Valerie Phillips, is a member herself of many diversity-focused organizations including the Local Government Hispanic Network, the League of Women in Government, the Professional Women's Network, Mexican Professionals, and Women Leading Government. She networks frequently with fellow members to gain insight into which potential candidates are leaders in their field.

Mr. Phillips will seek to reach candidates in communities and organizations with demographic profiles and populations served like that of the City of Brisbane, to maximize the potential for individuals from a wide variety of backgrounds, cultures, physical abilities, life experiences, and gender to be considered for the City Manager position.

STEP 3 RECRUIT CANDIDATES

The strongest candidates are often those who are successful and content in their current positions and need to be sold on a new opportunity. Our extensive network of contacts, developed through over 1,400 successful placements, is a primary source for identifying and obtaining referrals for these candidates. Our in-house database of 40,000 current and former executive and professional candidates is a valuable resource that can only be built over time—time that we have invested into perfecting our process for finding the right candidates for our clients. Our aggressive outreach efforts are focused on phone calls to personally invite potential applicants, answer questions, and allay any reservations, and these efforts are essential to the success of the City Manager recruitment.

STEP 4 SCREEN CANDIDATES

Following the closing date for the recruitment, Mr. Phillips will screen all resumes we have received, using the criteria established in the candidate profile as a basis upon which to narrow the

field of candidates. Internal candidates receive sensitive consideration, and Mr. Phillips will discuss with the City Council how the City of Brisbane wishes to proceed with these candidates.

STEP 5 CONDUCT PRELIMINARY INTERVIEWS

Mr. Phillips will personally interview the top 10 to 15 candidates from the resume screening, with the goal of determining which candidates have the greatest potential to succeed in your organization. To reduce travel-related expenses to our clients and increase efficiency in the search process, these interviews are typically conducted via Skype, FaceTime, or other convenient videoconferencing applications.

During these in-depth interviews, Mr. Phillips will explore each candidate's background and experience as it relates to the City Manager position, such as significant accomplishments, size and scope of responsibility, and organizational culture. In addition, Mr. Phillips will discuss with the candidates their motivation for applying for the position and assess his/her knowledge, skills, and abilities. We will devote specific attention to establishing the likelihood of the candidate's acceptance of the position if an offer of employment is made.

STEP 6 SEARCH PUBLIC RECORDS

Under the direction of Mr. Phillips, your dedicated Recruitment Coordinator will conduct a review of published print and online articles for each recommended candidate. Sources include Lexis-Nexis™, Google, social media, and our contacts in the field. This will alert Mr. Phillips to any further detailed inquiries we may need to make before our recommendations are finalized.

STEP 7 MAKE RECOMMENDATIONS

Based on our findings during the preliminary interview process, Mr. Phillips will recommend a limited number of candidates for your further consideration. He will make specific recommendations and will help facilitate discussions regarding the candidate pool, but the final determination of those to be considered will be up to you.

We typically recommend 6-8 candidates that we feel will best match your expectations, and we prepare a detailed written report on each candidate. This bound report provided to each member of the decision-making body includes:

- Candidate list with Recommended Finalists identified in *Group 1* and *Group 2* (primary and secondary recommendations), as well as *Internal* candidates
- Summary of experience, education, and salary information for each Recommended Finalist candidate
- Complete cover letter and resume for each Recommended Finalist candidate
- List of *Other Applicants* (those who did not meet minimum qualifications or were otherwise unsuitable, based on our screening process)

Bob Murray & Associates maintains all search records for a period of seven (7) years following each recruitment, and we are happy to forward cover letters and resumes for each applicant by postal mail or email as soon as the recruitment closes to new applications.

STEP 8 FACILITATE FINAL INTERVIEWS

Our years of experience will be invaluable as we help you develop an interview process that objectively assesses the qualifications of each candidate. We will work with the City of Brisbane to craft and implement an interview approach that fits your needs. This may include individual and panel interviews by the City Council and key stakeholders, community/employee interview panels, writing and presentation samples, meet-and-greets, or another specialized process element Mr. Phillips helps the City of Brisbane to design.

Mr. Phillips will be present on-site during the interviews to facilitate as necessary during the process and to guide discussion to consensus regarding final candidates. Bound interview books will be provided to each interview panel member containing:

- Recruitment brochure with candidate profile
- Interview schedule
- Suggested interview questions
- Experience summary, cover letter, resume, and rating form for each candidate
- Ranking forms for use during the panel interview process

We will work closely with your staff to coordinate and schedule interviews and candidate travel. Our goal is to ensure that each candidate has a very positive experience, as the way the entire process is conducted will influence the final candidates' perception of your organization.

STEP 9 CONDUCT BACKGROUND AND REFERENCE CHECKS

Mr. Phillips and your Recruitment Coordinator will conduct detailed reference checks for up to three (3) final candidates. To gain an accurate and honest appraisal of the candidates' strengths and weaknesses, we will talk candidly with people who have direct knowledge of their work and management style. In addition to gaining a 360-degree view of candidates from the perspective of their supervisors, subordinates and peers for the past several years, we will make a point of speaking confidentially to individuals who may have further insight into a candidate's abilities but who may not be on their preferred list of contacts.

Your Recruitment Coordinator will work with candidates and our professional backgrounding firm, HireRight, to conduct credit, civil litigation, and motor vehicle record checks and verify candidates' degrees.

STEP 10 ASSIST IN NEGOTIATIONS

We recognize the critical importance of successful negotiations and can serve as your representative during this process. Mr. Phillips knows what other organizations have done to put deals together with great candidates and what the current market is like for City Manager positions in organizations like the City of Brisbane's. He will be available to advise you regarding current approaches to difficult issues, such as housing and relocation. We will represent your interests and advise the chosen candidate and you regarding salary, benefits, and employment agreements, with the goal of putting together a deal that results in the appointment of your chosen candidate.

With our proven experience and vested interest in a positive outcome, we can turn a very difficult aspect of the recruitment into one that is straightforward and agreeable for all parties involved.

COMPLETE ADMINISTRATIVE ASSISTANCE

We receive many unsolicited testimonials each year from clients and candidates alike noting our prompt, considerate, accurate, and professional service during the search process. Throughout the recruitment, in time intervals that suit the City of Brisbane, we will provide you with updates on the status of the search and attend to all administrative details on your behalf.

Candidates receive immediate acknowledgement of their applications, as well as personal phone calls and/or emails (as appropriate) advising them of their status at each critical point in the recruitment. Candidates who receive preliminary or final interviews and are not chosen to move forward in the interview process will receive personal calls from Mr. Phillips on behalf of the City of Brisbane.

It is our internal company standard that all inquiries from clients and candidates receive a response within the same business day whenever possible, and certainly within 24 hours if the inquiry is received during the work week. Mr. Phillips will be available to the City of Brisbane by office phone, cell phone, and email at any time to ensure a smooth and stress-free recruitment process.

COSTS AND GUARANTEE

PROFESSIONAL FEE AND EXPENSES

The fixed, flat professional services fee for conducting the City Manager recruitment on behalf of the City of Brisbane is \$25,000. Services provided for in this fee consist of all steps outlined in this proposal, including three (3) meetings on site. The professional fee does not limit the amount of time invested by Bob Murray & Associates in promoting a successful outcome for this project. In fact, our mission for this project is to ensure we assist in identifying the right candidate for the City of Brisbane. Therefore, Mr. Phillips will contact the City at the first anniversary of the placement to confirm an effective transition has occurred.

The City of Brisbane will also be responsible for reimbursing expenses Bob Murray & Associates incurs on your behalf. We estimate expenses for this project not to exceed \$7,000. Reimbursable expenses include (but are not limited to) such items as the cost of recruiter travel; clerical support; brochure development; placement of ads; credit and civil background checks; education verification; and public records searches. Postage, printing, photocopying, and telephone charges are allocated costs and included in the expense estimate. *In no instance will expenses exceed this estimate without prior approval from the City of Brisbane.*

Expense reimbursement for candidate travel related to on-site interviews will be the responsibility of the City of Brisbane.

Professional Fees and Reimbursable Expenses	
Professional Services (Fixed Flat Fee)	\$25,000
Reimbursable Expenses <i>Example costs and approximate amounts include:</i>	
Brochure Design and Printing (\$1,275)	
Advertising (\$3,000)	
Background Checks – 3 candidates (\$550)	
Consultant Travel (\$1,600)	
Other expenses – supplies, shipping, clerical (\$575)	
Not-to-Exceed Total	\$7,000

Optional Services

- Community/Staff Input Forum: \$1,500/day, plus travel expenses
- Online survey: \$250
- Additional on-site meeting days: \$1,500/day, plus travel expenses
- Additional background checks: \$250/candidate
- Additional reference checks: \$500/candidate
- Other services: \$250/hour or \$1,500/day

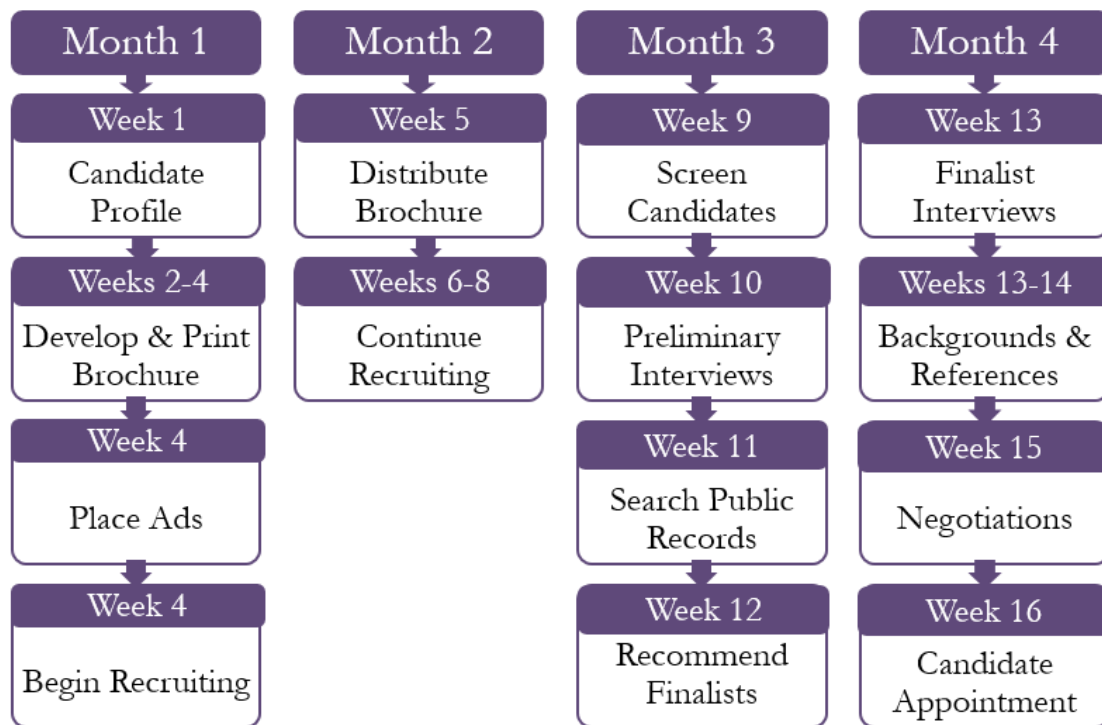
GUARANTEE

Should a candidate recommended by our firm position resign or be terminated within the first 12 months of employment, we will provide the City of Brisbane with professional services to secure a replacement. Services will be provided at no cost, aside from expenses incurred on the City of Brisbane's behalf during the new search. We are confident in our ability to recruit outstanding candidates and do not expect the City to find it necessary to exercise this provision of our proposal.

RECRUITMENT SCHEDULE

We are prepared to start work on this assignment upon receipt of a signed professional services agreement or other written, authorized notification. A full search can be completed in 13-16 weeks from the date of initial meetings with our client.

The final recruitment schedule will be determined in collaboration with City of Brisbane. A typical timeline of tasks and events is included here for reference.



FIRM PROFILE

OUR STAFF

Bob Murray & Associates is a small firm focusing exclusively on executive search services. We have a team of fifteen (15):

- Bob Murray, *Founder*
- Valerie Gaeta Phillips, *President*
- Gary Phillips, *Executive Vice President*
- Joel Bryden, *Vice President*
- Yasmin Beers, *Senior Executive Recruiter*
- Carmen Valdez, *Senior Executive Recruiter*
- Adele Fresé, *Senior Executive Recruiter*
- Bryan Hill, *Senior Executive Recruiter*
- Stacey Stevenson, *Senior Executive Recruiter*
- Deanna Cantrell, *Executive Recruiter*
- Jon Lewis, *Executive Recruiter*
- Alexandria Kopack, *Recruitment and Operations Manager*
- Kathy Lolas, *Senior Recruitment Coordinator*
- Stephanie Marshall, *Recruitment Coordinator*
- Gini Herndon, *Contracts Administrator/Bookkeeper*

BOB MURRAY, FOUNDER

Mr. Murray—known simply as “Bob” to his clients and candidates throughout the western U.S.—brings over 40 years’ experience as a recruiter and is recognized as one of the top local government recruiters in the nation. He conducted hundreds of searches for cities, counties, and special districts and was called on to conduct searches for some of the largest, most complex organizations in the country—and some of the smallest. Bob conducted searches for chief executives, department heads, professional and technical positions, taking the lead on many of the firm’s most difficult assignments with great success. His clients retained him again and again, given the quality of his work and success in finding candidates for difficult to fill positions.

As our Founder, Bob currently takes on few searches personally but continues to be an active presence at Bob Murray & Associates, providing valued insight and experience to our team members regarding all aspects of the recruitment process.

Mr. Murray received his Bachelor of Science Degree in Criminology from the University of California at Berkeley with graduate studies in Public Administration at California State University at Hayward.

VALERIE GAETA PHILLIPS, PRESIDENT AND RECRUITER

Ms. Gaeta Phillips has over 18 years of recruiting experience, including more than a decade of recent experience in executive search for public, private, and startup companies nationwide. Since joining Bob Murray & Associates, Valerie has completed over 160 searches in a diverse range of

fields, including city and general management, planning, finance, human resources, transportation, communication and public relations, community and economic development, information technology, parks and recreation, and operations. She has recruited at all levels of municipal and non-profit organizations, from technicians and engineers to Executive Directors and Chief Executive Officers.

Valerie is valued for her passion for finding and retaining the most outstanding candidates for even the most difficult or untraditional assignments and for her commitment to her clients' success; she is also active in a variety of industry organizations and in diversity-focused associations. Valerie is called upon often to serve as an expert speaker on topics such as managing one's online reputation, diversity issues in municipal and non-profit leadership, and how to identify a positive placement for the organizational culture.

Ms. Gaeta Phillips, along with Executive Vice President Gary Phillips, has a passion for helping people, evidenced by fundraising, sponsorship, and involvement in raising awareness for organizations such as Autism Speaks, the UC Davis M.I.N.D. Institute, and the Northern California Special Olympics.

GARY PHILLIPS, EXECUTIVE VICE PRESIDENT AND RECRUITER

Since joining Bob Murray & Associates, Mr. Phillips has completed over 125 searches for executives and professionals in a wide variety of fields including animal services, city and general management, planning, legal counsel, cyber security, and human resources. Gary's clients have ranged from municipal government to non-profit and private sector organizations, and he has sourced outstanding candidates for positions from the level of division managers up to City Managers, Executive Directors, and General Managers.

Gary started his career with a New York-based Fortune 100 company and quickly became a Senior Manager, building and running a large customer service organization that eventually expanded to 13 countries in Europe. He proceeded to hold senior leadership positions in several Fortune 500 companies, with noted successes such as building an organization from two to 250 employees worldwide and growing a company from 800 to 1200 employees.

As part of an executive acquisition and recruiting team, Gary helped build a start-up enterprise software company in San Francisco, recruiting top-notch talent and building a world-class organization. He has maintained customer relationships in the public sector and the private sector, including medical and financial institutions. He prides himself on finding key talent and offering the best customer service to his clients.

Mr. Phillips, along with Ms. Gaeta-Phillips, is involved in his community as a soccer coach, as an organizer of fundraisers for Autism Speaks and the UC Davis M.I.N.D. Institute, and as a sponsor of the Northern California Special Olympics. Mr. Phillips received his Associate of Science degree and completed additional coursework at Rochester Institute of Technology, NY.

JOEL BRYDEN, VICE PRESIDENT AND RECRUITER

Mr. Bryden has over 30 years of local government experience that he brings to the firm, having retired as Chief of Police in Walnut Creek, CA prior to joining Bob Murray & Associates in 2013.

Throughout his career, Joel has been involved in public sector consulting, with vast experience in hiring and promotional processes, as well as interviewing candidates for advancement in all aspects of local government.

Joel has a solid reputation as a leader in the public sector and his ability to find and evaluate outstanding applicants for our clients is invaluable in the search process. Since joining Bob Murray & Associates, Joel has conducted over 100 recruitments in a broad range of sectors including police, fire, building, planning, city management, and general management. He is often called upon to recruit specialized or difficult-to-fill positions, such as Independent Police Auditor.

Mr. Bryden is a graduate of the FBI National Academy and obtained his Bachelor of Arts Degree in Communication from San Diego State University. He is currently based in Walnut Creek, CA.

YASMIN BEERS, SENIOR EXECUTIVE RECRUITER

Yasmin Beers brings over 33 years of municipal government experience to Bob Murray and Associates. Yasmin retired as the City Manager for Glendale with a population of over 200,000. She served as Chief Executive Officer overseeing close to 2,000 employees serving in Police, Fire, Public Works, Parks, Community Development, Library Arts & Culture, Innovation Performance & Audit, and Water & Power to name a few.

Yasmin's three decades of experience in public service brings extensive background in public sector finance, human resources management, contract negotiations, strategic planning & organizational leadership, policy development, emergency response & planning, team building and performance improvement. Throughout her career, Yasmin has had a great deal of experience in recruiting, selecting and hiring employees for executive and management level positions with a focus on the organizational needs and culture.

Yasmin currently serves on the Glendale Adventist Medical Center's Civic Advisory Board and the Advisory Board for Village Christian School. Yasmin is a past member of Soroptimist International of Glendale where she served as President in 1999/2000. She is a past board member of Glendale Healthy Kids, Salvation Army and the American Red Cross. In 2011 the Glendale Chamber of Commerce recognized Yasmin as Woman of the Year; in 2013 she was the recipient of The Armenian American Woman of Excellence Award; in 2014 Yasmin was recognized by the Glendale Educational Foundation for her distinguished service and philanthropic efforts; in 2015, YWCA awarded Yasmin with the Heart & Excellence Award; in 2017, she was recognized by Business Life Magazine as a Women Achiever; and in 2018 the California State Senate recognized Yasmin as one of the Woman of the Year, each a tribute to her core values that represent her civic responsibilities, volunteerism and community service.

Yasmin has a Bachelor of Arts degree in Political Science from California State University, Northridge and a Master's degree in Organizational Leadership from Woodbury University.

CARMEN VALDEZ, SENIOR EXECUTIVE RECRUITER

Carmen Valdez provides executive recruitment and human resource services to municipal government agencies and non-profits. She has more than 25 years' experience in team-building, executive search, general human resources, classification and compensation, testing, policy

development, performance management, organizational development, discipline, and other employee relations activities.

Carmen has most recently been consulting with Municipal Resource Group, prior to which she spent over 30 years with the City of Milpitas, a Silicon Valley city of 70,000 residents. In this capacity, she was responsible for collective bargaining, PEPR and Affordable Care Act implementation, modernizing Human Resource services to improve efficiencies and reduce costs, revamping the Workers Compensation service delivery and completing a City-wide strategic plan. Carmen also spent almost 2 years as the Director of Recreation Services.

In addition to her significant experience in the public sector, Carmen earned a Bachelor of Arts degree in Business from University of Phoenix. She is also a member of Local Government Hispanic Network and League of Women in Government. She is an avid runner and enjoys giving back to her community.

ADELE FRESÉ, SENIOR EXECUTIVE RECRUITER

Adele Fresé brings 27 years of local government experience to Bob Murray & Associates, having retired as Chief of Police in Salinas, CA prior to joining the firm in 2021. Adele began her public service career in 1985 as an active-duty member of the United States Marine Corps before serving the City of Corpus Christi for 20 years.

Adele has extensive experience in hiring and promotional processes, as well as interviewing candidates for advancement in all aspects of local government.

During her 7 years as a Chief of Police, Adele exercised strong leadership and implemented monumental changes leading to the diversification of her agency's sworn staff. Adele's commitment to collaboration with the public and law enforcement agencies earned her the Partner of the Year Award from Homeland Security Investigations, and her Department the Community Policing Award from the Community Policing Institute of California.

Adele received her Bachelor of Science degree in Criminal Justice Administration from California State University at Hayward, and a minor degree in Sociology. She earned a Master of Science in Public Safety, completed the Senior Executives in State and Local Government program at the Harvard Kennedy School, and PERF's Senior Management Institute for Police. She is a Texas Certified Public Manager.

BRYAN HILL, SENIOR EXECUTIVE RECRUITER

Chief Bryan Hill (ret.) spent over 30 years serving as a public safety leader in the San Francisco Bay Area. During his career, he worked for three appreciably different East Bay cities and developed and led several regional programs providing him a broad perspective of local government. Much of Bryan's career was spent working in a wide variety of leadership and executive level roles. As a police chief and city department head he was known for a progressive and principled leadership approach.

Throughout his career, Bryan emphasized community engagement. As a municipal government executive, he was dedicated to establishing lasting community partnerships, building strong teams, and continues to participate in leadership development.

Bryan received the California Police Officer's Association Award of Distinction for his efforts in developing regional partnerships that increased efficiencies, professionalism and service to the community. Bryan received his Bachelor of Arts degree in Social Science from California State University, Sacramento and he earned a Master of Science in Organizational Leadership. He is a graduate of the FBI National Academy and holds a California POST Executive Certificate.

STACEY STEVENSON, SENIOR EXECUTIVE RECRUITER

In Ms. Stevenson's 32 years of service in municipal government, she worked for the California cities of San Diego, National City, and Murrieta. Ms. Stevenson began her professional career in City of San Diego as a Personnel Analyst and went on to work in the Personnel, Metropolitan Wastewater, Engineering, and Contracting departments; as well as the City Manager's office, progressing from Analyst to Deputy Director. She also assumed special projects such as the creation and opening of the City's neighborhood service centers and Liaison to the City Council.

From San Diego she joined the City of National City where she served as the Director of Human Resources, the Director of Administrative Services, and Deputy City Manager. She oversaw Community Services, Finance, Human Resources, and Information Technology; and managed special projects such as the balloting and passage of the City's local sales tax and the implementation of a new payroll module.

In the City of Murrieta, Ms. Stevenson served as Administrative Services Director and Deputy City Manager, again overseeing Community Services, Finance, Human Resources and Information Technology and managing special projects. Ms. Stevenson has also served as a commissioner on both the Child Care and Civil Service Commissions for the City of Chula Vista.

Ms. Stevenson holds a Bachelor's degree in Industrial Organizational Psychology as well as a Master of Business Administration degree with an emphasis in Human Resource Management.

DEANNA CANTRELL, EXECUTIVE RECRUITER

Deanna Cantrell brings 28 years of municipal government passion and experience to Bob Murray & Associates as an executive recruiter. Deanna is recognized as a prominent driver of public safety leadership, innovative and evidence-based problem solving, advancing trust and community building, and developing leaders. She has a proven record for exceptional communication, talented public speaking, forward thinking policing, strategic planning, staff development, mentoring, and coaching.

Deanna was the Chief of Police for the City of Fairfield, California for over two years. Prior to that, Deanna served almost five years as the Chief of Police in San Luis Obispo (SLO) California, and over 21 years with the Mesa, Arizona Police Department where she moved through the ranks from Officer to Assistant Chief.

Deanna has built a deep-rooted history of building trust with the community, improving employee health and wellness, and advancing meaningful police transformation. Deanna has developed numerous testing processes, has assisted in over 20 executive recruitments, and is gifted in mentoring, coaching and recognizing and developing talent. She served for four years as the Co-Chair for the California Women Leaders in Law Enforcement (WLLE) and is the WLLE Foundation Board President, also chairing the mentoring committee. Deanna served for six years on the California Police Chiefs Association Board. She is currently an Executive Fellow for the National Policing Institute and is on the Board for Police2Peace. In 2018 Deanna was selected as the 24th District, California Congressional Woman of the year, and in 2022, Women Leaders in Law Enforcement established the Deanna Cantrell Exceptional Leadership award.

Deanna holds a Bachelor of Science in Education and a Master of Administration from Northern Arizona University. She has an Executive Development Certificate from CA POST, teaches Advancing Ethical Leadership for CA POST through Cal State Long Beach, and is a graduate of Northwestern University Police Staff and Command School where she is also an adjunct faculty member, teaching policy, executive image, strategic planning, internal conflict.

Deanna enjoys the arts, playing the guitar, golfing, and growing future leaders.

JON LEWIS, EXECUTIVE RECRUITER

Jon Lewis brings over 30 years of municipal government experience to Bob Murray and Associates. Jon began his career in public service in 1991 with the City of Newport Beach, an iconic coastal community of 53 square miles in Southern California. After successfully working his way through the ranks of the Police Department, he honorably retired in December of 2022 after serving as the Chief of Police for nearly seven years. Jon is known for his commitment to selfless service, ethical leadership and maintaining longstanding community partnerships. During his tenure as Chief of Police, the Newport Beach Police Department achieved reduction in crime to historic lows through effective, data-driven community policing strategies as well as excellence in emergency response and 911 call answer times.

Jon graduated with honors from California State University Long Beach with a Bachelor of Science degree in Criminal Justice and Speech Communication, and holds a Master of Arts degree in Criminal Justice from Chapman University. He is a graduate of several advanced law enforcement training courses including the California Commission on Peace Officer Standards and Training Command College. Jon has authored two university-level textbooks in criminal justice and is an instructor with the Center for Criminal Justice Research and Training at California State University Long Beach.

He and his wife, Darcy, have two children and reside in Orange County.

ALEXANDRIA KOPACK, RECRUITMENT AND OPERATIONS MANAGER

Alex is the Recruitment & Operations Manager with Bob Murray & Associates, and partners closely with each executive recruiter to support both clients and candidates through the entire recruitment process. Alex offers support to the recruitment coordinators by ensuring each employee has the tools necessary for success within the firm. She also posts available positions to

job boards, schedules interviews, conducts background checks on candidates, and creates marketing materials for each search.

Alex graduated with a bachelor's degree in Business Administration from Boise State University. She has several years of experience in many different office settings and is eager to assist in the hiring process.

In her spare time, Alex enjoys spending time with her husband, family, and poodle (Theo), as well as playing tennis whenever weather allows.

KATHY LOLAS, SENIOR RECRUITMENT COORDINATOR

Kathy recently joined the Bob Murray & Associates team after eight years of retirement. She is serving as a Recruitment Coordinator and brings over 30 years of experience from the residential real estate, state government, and life coaching industries. As a Recruitment Coordinator, Kathy partners closely with executive recruiters to provide support to candidates and clients throughout the recruitment process. She assists with scheduling, conducting background checks, creating marketing materials, and posting advertisements for open recruitments.

Kathy returned to graduate school in 2015, earned her Master's degree and launched a private life-coaching practice. She is known for her outgoing personality, attention to detail and collaborative approach to successfully completing executive recruitments. In her free time, Kathy enjoys playing jazz piano, travel, boating, and playing with her poodle, "Rocky".

STEPHANIE MARSHALL, RECRUITMENT COORDINATOR

Stephanie serves as a Recruitment Coordinator with Bob Murray & Associates, partnering closely with executive recruiters to support clients and candidates through the recruitment process. She assists with scheduling interviews, creating marketing materials, posting advertisements, and conducting background checks, as well as many other administrative tasks that contribute to the success of each recruitment.

Stephanie graduated with a Bachelor's degree in Anthropology and earned a Paralegal certification from the University of California, Davis. She's worked in various offices before her time at Bob Murray & Associates and is excited to assist in the hiring process.

During her free time, Stephanie enjoys spending time with family, reading high fantasy novels, and being out on the water.

GINI HERNDON, CONTRACTS ADMINISTRATOR/BOOKKEEPER

Ms. Gini Herndon is the Contracts Administrator/Bookkeeper at Bob Murray & Associates. Ms. Herndon is the first point of contact at Bob Murray & Associates and has an extensive administrative background in business law.

Ms. Herndon is known for her collaborative approach as she works closely with our internal team and clients to ensure a successful search. As a first point of contact, Ms. Herndon is highly professional and maintains a high level of confidentiality and sensitivity.

CORPORATION

Bob Murray & Associates was founded in May 2000 and operated under the corporation name MBN Services, Inc. until June 2014; our new corporation name is GVP Ventures, Inc., incorporated in California in 2014. Contact information for the corporation and the firm is as follows:

GVP Ventures, Inc. OR Bob Murray & Associates
1544 Eureka Road, Ste. 280
Roseville, CA 95661
(916) 784-9080
apply@bobmurrayassoc.com

Our corporation and firm are financially sound (and have been so since 2000), with documentation from our accountant available to your organization prior to final execution of a professional service agreement. We have never been involved in any litigation, aside from our personnel serving as expert witnesses when called to do so.

PROFESSIONAL ASSOCIATIONS

Our firm, represented by either our President or our Executive Vice President, are involved in the following organizations to remain engaged with current and future issues relevant to the work we conduct on behalf of clients like City of Brisbane:

- California Special Districts Association – *Member*
- California City Management Foundation (CCMF) – *Member*
- International City/County Management Association (ICMA) – *Member*
- League of California Cities – *League Partner*
- League of Women in Government – *Sponsor/Member*
- Municipal Management Association of Northern California (MMANC) – *Sponsor/Member*
- Municipal Management Association of Southern California (MMASC) – *Sponsor/Member*
- National Forum for Black Public Administrators (NFBPA) – *Committee member for Marketing and Branding*

Members of our leadership team not only attend events sponsored by these associations but are also frequently called upon to serve as panel members and to provide specialized lectures regarding industry-specific issues.

Recent and upcoming speaking engagements and trainings provided by our staff include:

- “Role of the Chief” class, presented by Joel Bryden on behalf of the California Police Chiefs Association
- Organization of Latino Affairs invited speaker, Valerie Phillips for Hispanic Heritage Month; and
- “The Next Step on Your Career Ladder: A Rung Up or a Missed Step? What City Managers are Seeking to Create a Dream Team,” Bob Murray & Associates is a leading participant on the MMANC 2019 Conference Panel

REFERENCES

Clients and candidates are the best testament to our ability to conduct quality searches. Clients for whom Bob Murray & Associates has recently conducted similar searches are listed below:

CLIENT: City of Auburn, CA
POSITION: City Manager
REFERENCE: Ms. Joan Phillipe, Interim City Manager
(916) 616-9615

CLIENT: City of Livermore, CA
POSITION: City Manager
REFERENCE: Ms. Nancy Dias, Human Resources Manager
(925) 960-4115

CLIENT: City of Rohnert Park, CA
POSITION: City Manager
REFERENCE: Ms. Michelle Kenyon, City Attorney
(510) 388-4669

*We appreciate the City of Brisbane's consideration of our proposal
and look forward to working with you.*



C.



LIVERMORE
CALIFORNIA

CITY
MANAGER

THE COMMUNITY

Located in the heart of the northern California megaregion, Livermore is a thriving city with a collaborative and community-centered spirit. It is one of California's oldest wine regions, home to two national research labs, and even has its own element: Livermorium. There are fountains where children play, superb libraries, tech maker spaces, farmers' markets, a dynamic performing arts community, and even an annual rodeo.

The City was founded in 1869 and encompasses 26.44 square miles, with a population of approximately 90,000 residents. There are a wide range of amenities and cultural opportunities: over fifty wineries, year-round diverse cultural and civic events, an outstanding downtown and arts district with fine restaurants, local retail, and a 500-seat performing arts theatre. The City and its partner agency, Livermore Area Parks and Recreation District (LAPRD), maintain forty parks and forty-one miles of bicycle trails and paths. Nearby, there are several larger regional recreation areas. In addition, Livermore has a premium outlet center, Las Positas Community College, and the Livermore Municipal Airport.

Livermore is best defined by its strong community spirit. City culture fosters this with a willingness to listen, collaborate, and work together to accomplish goals. In 2021, that spirit was rewarded as Livermore received the All-America City Award, one of ten cities nationwide and the only California city to earn this award. The City, together with the school, community college, and park districts, collaborated to accomplish goals that improved youth mental health, restricted youth vaping, addressed housing inequity and homelessness, and built a foundation to address equity and inclusion across the City.

Continuing to nurture our unique and diverse culture is an essential part of Livermore's character.

THE ORGANIZATION

Livermore is a General Law city, operating under the Council-Manager form of government. The City Council provides policy direction to the City Manager and the City Attorney. The City Attorney's office provides legal counsel for the City Council, volunteer advisory groups, and City staff. The City Manager and City Attorney work with each other and their respective staffs to inform and implement Council directions and policies.

The City Council consists of four districted Council Members, each serving no



more than two four-year terms, and an at-large Mayor, serving no more than four two-year terms. As the City's legislative body, Council sets policy and goals, enacts ordinances and resolutions, adopts the City budget, represents the City on County and regional governmental agencies, and carries out other municipal responsibilities.

The City Manager's Office has several areas of responsibility. It translates the Council's community vision into reality by enacting City policies and procedures adopted by Council. It is responsible for ensuring that all City Departments operate competently and effectively. It works with local and regional intergovernmental groups to advocate for and represent the City's interests. Finally, it nurtures Livermore's strong community spirit and encourages civic engagement through ongoing communication and dialog.

The City of Livermore employs around 415 people organized as follows.

- Administrative Services provides finance, technology, human resources, and other support services, and is where the City Clerk's Office resides.
- Community Development manages land use, building construction, infrastructure development, and housing and human services.
- Office of Innovation & Economic Development develops and implements programs that develop our vibrant, innovation-driven business and arts communities.
- Livermore Public Library connects everyone with information, education, and inspiring experiences to support individual interests and build community.



- Public Works operates and manages Livermore's infrastructure and assets including the City's airport, water and sewer services, and waste collection.
- Police Department protects the City's residents with a problem-solving, service-oriented philosophy.
- Livermore-Pleasanton Fire Department is a joint powers authority that is administered by the City Managers for Livermore and Pleasanton to manage the risk of fire, work to limit injury and property damage from disasters, and to prepare City staff and the community as a whole for disaster response.

In addition, the City's sister agency, LARPD, provides most recreation and leisure services, albeit in close conversation with public works.

THE POSITION

As one of only two employees hired by the City Council, the City Manager has great responsibility that extends from implementing long-range visions to managing individual resident's concerns. The City Manager must model the qualities the city strives to embody: integrity, competence, accountability, vision, and a collaborative spirit. The City Manager's specific responsibilities include:

- Working with and supervising the executive team to execute the City Council's policies and, in conjunction with the City Attorney's office, recommending adoption of ordinances and resolutions as directed by Council.
- Maintaining a healthy and vibrant work environment, informed by deep knowledge of trends in municipal government issues. As the final authority over City employees, the City Manager is responsible for recommending and implementing appropriate personnel policies, and effectively addressing any personnel issues.
- Ensuring a fiscally sound yearly budget that enables forward progress and ensuring good management of the City's infrastructure and assets.
- Interacting with community members to address issues, questions, or complaints about the administration of the City government or services maintained by public utilities in the City.
- Performing the duties as the Director of Emergency Services.



- Co-administering the Livermore-Pleasanton Fire Department joint powers authority.
- Representing the City with other governmental agencies locally and regionally.

THE IDEAL CANDIDATE

As Livermore develops its vision for the coming decades, the ideal City Manager will be someone who can transition from past to future while purposefully nurturing the City's communal spirit.

The ideal candidate will be intellectually curious and creative. They will be able to imagine and implement the City's long-range vision in a collegial and professional way, working collaboratively with Council, community members, regional partners, and staff. They will be personable and professional, able to develop and earn the respect of colleagues, community, and Council.

The ideal candidate will inspire and empower staff by modeling respect and collegiality and will embrace diversity, equity, and inclusion. They will foster an open and transparent environment, encourage, and model continuous improvement and best practices through respectful and clear goals and appropriate evaluation.

Qualifications: The ideal candidate will hold a Master's degree in public or business administration or related field, with a robust financial background. They will have experience as City Manager, Assistant City Manager, or Department Director, along with many years of increasingly responsible management experience in a local public or private agency.



COMPENSATION

The City Manager's salary will depend on experience and qualifications. The City of Livermore offers a highly competitive compensation and benefits package including:

Cafeteria Plan (Medical, Dental Vision) – Employer maximum of \$1950/month toward medical, dental, and vision insurance. The unused portion of the City's contribution will be added as taxable income to the employee's earnings.

Life Insurance – \$175,000 employee coverage and \$1,000 dependent coverage.

PERS –

- 1st Tier - 2.7% at 55 (Employees hired prior to 12/30/12); Member Rate - 8% employee paid.
- 2nd Tier - 2% at 60 (Classic PERS Misc Member); Member Rate - 7% employee paid.
- PEPR Tier - 2% at 62 (New PERS Misc Member); Member Rate - 6.25% employee paid.

Retirement Health Savings (RHS) – City contribution of 4% of base pay into RHS account. Medicare – Employee paid 1.45%; Employer paid 1.45%. The City does not participate in Social Security except for Federal Medicare.

Vacation – Years of Service Accrual per Year 1 80.6 hrs 2-5 120.12 hrs 6-10 135.98 hrs 11-15 160.94 hrs 16-19 180.18 hrs 20+ 192.4 hrs

Holidays – 12 observed holidays.

Sick Leave – 96.2 hours per year. (PERS benefit for unused sick leave).

Other benefits may include: Tuition Reimbursement, Cell Phone Allowance, Bereavement/Funeral Leave, Health Club Reimbursement.

TO APPLY

This is a confidential process. To be considered for this career opportunity candidates should submit a cover letter and resume and apply online at:

www.bobmurrayassoc.com

**Filing Deadline:
February 6, 2022**

Following the closing date, resumes will be screened according to the qualifications outlined above. The most qualified candidates will be invited to personal interviews with Bob Murray and Associates. Candidates will be advised of the status of the recruitment following finalist selection. Finalist interviews will be held with Livermore City Councilmembers. A select group of candidates will be asked to provide references once it is anticipated that they may be recommended as finalists. References will be contacted only following candidate approval. The select group of candidates may also be asked to complete a supplemental questionnaire to provide additional information about their experience. Candidates will be advised of the status of the recruitment following selection of the City Manager.

If you have any questions, please do not hesitate to call Gary Phillips at:

(916) 784-9080





CITY
MANAGER



THE COMMUNITY

Building on recent progress, the City of San Bruno is ready for even more success. Just ten miles south of San Francisco and adjacent to the San Francisco International Airport, San Bruno sits at the center of three major freeways, the historic El Camino Real, two regional commuter rail lines (BART and Caltrain) and regional bus and express bus service - creating many exciting opportunities for transit-oriented mixed-use and residential redevelopment along transit corridors.

San Bruno, known as the "City with a Heart," is primarily a residential community, rich in ethnic diversity. With a population of 43,000, San Bruno is home to the world headquarters of YouTube and Walmart.com and boasts a diverse and up-and-coming downtown retail core. Located directly adjacent to the City of South San Francisco and its world-renowned Life Science industry, San Bruno is now attracting Life Science lab and research development along with interest from top residential developers for all types of housing at all affordability levels. San Bruno is a very diverse community which maintains a small-town charm while embracing the future and the need for economic growth and smart development, which is needed in order to strengthen city finances and create new revenue for city services, infrastructure, and community benefits.

San Bruno's mission is to provide exemplary services for the community that enhance and protect the quality of life. The City's values include integrity; protecting, guarding, and shepherding public resources and interests; teamwork; exemplary service to the community; competent, well-trained employees; friendliness; and commitment to the community.

THE ORGANIZATION

The City of San Bruno was incorporated on December 23, 1914, as a General Law City. San Bruno is governed by the City Council and operates under a Council-Manager form of government. As the policy-making body, it has the ultimate responsibility to the people of San Bruno and the implementation of all programs and City services. It approves all ordinances, resolutions, and major contracts, modifies and approves the budget, and has the responsibility of employing a City Manager and City Attorney. The City Council appoints residents to advisory boards, commissions and committees.

All major changes in direction or emphasis and organizational changes must be approved by the City Council. The City Council sets the policy and adopts the City budget. The City Manager and staff enforce the laws and implement the programs and policies which are established by the City Council.

San Bruno has an elected five-member City Council. The Mayor, one of the members of the City Council, is directly elected for a two-year term. The Mayor chairs the City Council meetings, issues proclamations of recognition, represents the City in certain intergovernmental affairs and is the ceremonial head



of the City. Although the Mayor is expected to provide political leadership on City issues, the Mayor has no greater authority than any other City Council member. The Mayor and City Council as a collective body is the power of authority.

On March 22, 2022, the San Bruno City Council completed its sixth and final public hearing on the district formation process. By adopting Ordinance 1907, the City Council established the City's first district map for City Council elections. The Ordinance implements by-district elections of four City Council Members beginning in November 2022. The City of San Bruno's first by-district election began with representatives for Districts 1 and 4 during the November 2022 election. In November 2024, the remaining two districts (2 and 3) will be up for election. Each district Council Member will serve a four-year term and must live in their respective district. The remaining Council Member, the Mayor, will continue to be elected every two years. In the 2022 election, voters also enacted term limits, limiting Council members and the Mayor to twelve consecutive years of service.

The City is a full-service municipal organization including police, fire, and a cable television/internet service enterprise (CityNet). Furthermore, the City operates a water supply system and produces water through five production wells. In addition to the City Manager's Office, the City has ten departments including: City Attorney's Office, City Clerk, Community & Economic Development, Community Services, Finance, Fire, Human Resources, Police, Public Works, and CityNet Services. There are six organized employee bargaining units, five of which are represented by Teamsters Union Locals 856 and 350.

THE POSITION

The City Manager is the Chief Executive Officer of the City and reports directly to the five-member City Council, providing policy and program support. The City Manager's office is comprised of the City Manager, the Assistant City Manager, the Assistant to the City Manager, an Executive Assistant, and a Management Analyst. In accordance with



the provisions of the Municipal Code, the City Manager is responsible for preparing and managing the implementation of the City Council's Adopted Annual Operating and Capital Improvement Program budgets which outline the City's annual work program and the five-year capital improvement program. The work program balances the cost of providing City services within the available financial resources.

The City Manager serves as the Chief Executive Officer of San Bruno. As such, the City Manager is responsible for the appointment and supervision of all City department heads other than the Public Works Director and Community Economic Development Director who report to the Assistant City Manager. The City Manager is also responsible for oversight of approximately 260 full-time employees and all City operations to ensure delivery of high-quality City services. In addition, the City Manager supports the City Council by guiding the formulation, development and implementation of Council directed policies, programs and projects.

The City Manager is the administrative head of city government operations including: Police, Fire, Public Works, Community & Economic Development, Parks, Recreation, & Community Services, CityNet Services, Finance, and Human Resources. This position also plays a key role in intergovernmental relations and legislative monitoring. Essential functions include participating in and directing the preparation and administration of the City budget; addressing City Council on behalf of City staff; representing City Council to employees, community groups, the public, and other agencies; and providing a variety of other complex administrative support to the City Council. The City Manager must be focused on best practices in municipal government in order to further enhance the delivery of services to residents and increase access of information to the public.

OPPORTUNITIES & PRIORITIES

Capital Projects – San Bruno has a 5-year Capital Improvement Program (CIP) totaling \$216 million. The City's major projects include completing and dedicating a new Recreation and Aquatic Center, constructing two new neighborhood parks, replacing aging water, wastewater, and stormwater infrastructure, installing cable fiber optic for high speed internet services, and more. The new City Manager will continue to ensure that these projects move forward toward development and completion.

Council Priorities – The new City Manager will be expected to quickly develop a strong partnership with the Mayor and City Council and will address Council's current priorities.

Growth & Economic Development – As the Bay Area continues its economic boom, San Bruno continues to develop and grow along with other peninsula cities. The new City Manager must be able to manage a healthy economic



development program while also maintaining quality of life for the existing community. Developing and revitalizing the downtown and Transit Corridors Area is a top priority.

Fiscal Management – San Bruno has continued to maintain financial stability and success despite downturn cycles in the economy. The new City Manager will continue this work with renewed focus on funding and executing on much-needed long-term infrastructure projects.

Organizational Development – San Bruno, similar to other local agencies, is experiencing the continued wave of retiring baby boomers. The new City Manager will ensure ongoing staff development through mentoring and training while providing appropriate oversight and accountability.

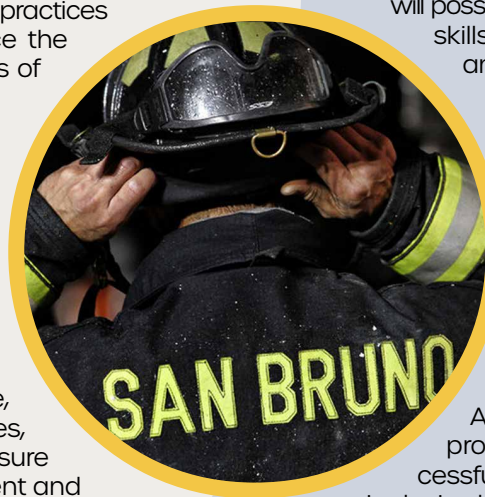
THE IDEAL CANDIDATE

The City of San Bruno is seeking a solution oriented, strategic, and proactive candidate to serve as the next City Manager. The ideal candidate must be committed to quality services and programs, and must be responsive to the diverse community while encouraging greater community partnerships and engagement. The successful candidate

will possess excellent interpersonal skills, emotional intelligence, and the political astuteness necessary to build and maintain relationships with Council, external partners, and the community. A collaborative, innovative, and adaptable candidate will be successful. The incoming City Manager must be a good listener with strong negotiation skills.

A forward thinker with a proven track record of successful employee management is desired.

The incoming City Manager must be a strong leader with a proven track record of mentoring and building teams while empowering staff. A team oriented and transparent candidate will do well. The successful candidate should have a history of working effectively with elected



and appointed officials, as well as labor unions. Resiliency, persistence, and patience are essential. The new City Manager must be capable of handling economic and commercial development while ensuring the long-term financial stability of the organization. Candidates must have the ability to strategically present all viable options and alternatives for the City Council's consideration with full disclosure of pros/cons without a bias.

The City is seeking an honest, trustworthy, and approachable candidate with effective communication skills, both orally and in writing. Candidates with knowledge and experience in development and planning are encouraged to apply. Other essential characteristics of the incoming City Manager include excellent problem-solving abilities; the ability to build and maintain a cohesive, talented, and engaged staff; and the ability to address regional issues. A result driven candidate with excellent follow through and a customer service mindset is desired.

Qualified candidates possess a Bachelor's degree and significant experience in local government, with a minimum of five (5) years of senior level executive management experience. Prior or current experience as a City Manager, Assistant/Deputy City Manager, Department Director, or similar capacity is desired. A Master's degree in a related field is preferred.

COMPENSATION

The annual salary range for the City Manager is \$275,141 to \$385,000. Placement is dependent on experience and qualifications. The City also offers an excellent benefits package including:

CalPERS Retirement

Classic Member (2.7% @ 55 with Employee Share 8%)

New Member (2% @ 62 with Employee Share 6.25%)

Vacation – based on years of service; up to 23 days annually

Sick Leave – 12 days annually

Holidays – 14.5 days annually

Management Leave – 100 hours

Medical/Dental/Vision/Prescription Insurance – Choice of two generous plans (\$10/\$20 Prescription Co-Pay Plan or 100% Prescription Coverage Plan) available with significant amount paid by City for Employee or Employee + Family; Opt-Out Benefit

Employee Home Loan Assistance Program – Lower of up to \$140,000 or 20% of home's purchase price

Life Insurance, ADD, and Long-Term Disability

*The City does not participate in Social Security except for the Medicare portion of 1.45%.

TO APPLY

If you are interested in this outstanding opportunity, please apply online at:

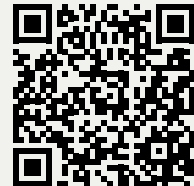
www.bobmurrayassoc.com

Filing Deadline:
May 1, 2023

Following the closing date, resumes will be screened according to the qualifications outlined above. The most qualified candidates will be invited to personal interviews with Bob Murray & Associates. A select group of candidates will be asked to provide references once it is anticipated that they may be recommended as finalists. References will be contacted only following candidate approval. Finalist interviews will be held with the City of San Bruno. Candidates will be advised of the status of the recruitment following selection of the City Manager.

If you have any questions, please do not hesitate to call Ms. Valerie Phillips at:

(916) 784-9080





June 16, 2023

Mayor Davis, Mayor Pro Tempore O'Connell, and Council Members Cunningham, Lentz and Mackin,
City of Brisbane
c/o Abby Partin, Human Resources Administrator
50 Park Place
Brisbane, CA 94005

Via PDF/Email to: apartin@brisbaneca.org

Dear Mayor Davis and Members of the City Council,

Thank you for considering Peckham & McKenney for the City of Brisbane recruitment for City Manager. Peckham & McKenney would be honored to represent you and the City in this important search and specifically *finding* excellent candidates for working with you, serving City residents, achieving your goals and continuing the strong, long and impressive legacy and leadership of Clay Holstine.

As a mid-size, long-standing, and boutique firm, Peckham & McKenney is known for achieving successful and long-term placements. Among *many* of our strong attributes, these are four key reasons cities choose us:

- We actively and personally search for and find candidates. We don't rely on ads and posts to attract applicants. We have an extensive network, use the telephone and LinkedIn, and sell the opportunity.
- We limit the number of concurrent searches to directly focus on serving our client.
- We prioritize communicating with our clients and applicants to keep everyone informed.
- Your recruiter is personally and directly responsible for all aspects of the search and your one point of contact.

The Peckham & McKenney team's values and priorities are to assist public agencies in furtherance of good government; place quality above quantity; and build long lasting relationships with those in the public service.

Our recruiting team is comprised of retired City executives who are passionate about the public sector. For example, I am a 27-year veteran of local government and a retired City Manager, having served first as Town Planner and then Town Manager of Los Altos Hills from 1999 to 2021. For this proposal, I will serve as your recruiter. I am very familiar with the responsibilities of the City Manager and expectations of the position. I also resided in northern San Mateo County for over 20 years, and I am familiar with the lay of the land. I understand what is necessary to find good candidates and have a strong, excellent network for attracting candidates.

Attached is an example of a Candidate Profile that illustrates the information we collect, detail and utilize to attract applicants. Also attached is our proposal for conducting the search that includes information about our firm, process, timeline, resources, references, experience and fee. We charge a fixed, all-inclusive fee and for this search, we are proposing \$28,000 that we would be pleased to discuss. I am also pleased to participate in a Zoom interview to personally present and discuss this proposal.

Peckham & McKenney is excited for the opportunity to implement the process leading to the successful placement of a candidate that “fits” the City’s interests. Please feel free to call me at 650.504.3515 if there are any questions.

Sincerely,

Carl Cahill

Carl Cahill, Executive Recruiter
Carl@PeckhamAndMcKenney.com

Enclosure:

City of Brisbane Search Proposal
Candidate Profile Example (City of Pleasant Hill, CA)

City of Brisbane

RECRUITMENT PROPOSAL

for

City Manager

June 16, 2023



Peckham & McKenney
EXECUTIVE SEARCH

Serving local governments (cities, counties, districts) by conducting recruitments and placing management and executive leaders that fit the personnel needs and interests of agencies.

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WHY CHOOSE US?

Peckham & McKenney focuses on *quality* searches and placements (over quantity) in recognition that each placement is “All about fit”. Serving local government since 2004, we are one of the most trusted and respected executive recruitment firms in the country. We have successfully placed hundreds of local government professionals including City Managers, County Executive Officers, General Managers, Police and Fire Chiefs, Department Heads, Assistant Managers, and mid-level Managers. Time and again, we receive unsolicited compliments from clients and candidates

in reference to our integrity and high ethics, commitment, follow-through, communication, and service. We take pride in treating both our clients and candidates with utmost respect.



For more information, please visit our website at www.PeckhamAndMcKenney.com.



OUR COMMITMENT TO YOU

Peckham & McKenney, by maintaining the quality, style, values and culture established by Bobbi Peckham and Phil McKenney, performs on the premise that an executive search firm must be dedicated to providing its clients and candidates with professional and responsive service, and a personal, hands-on approach. Our business philosophy is founded on the understanding that we are in a “people” related industry and that attention to others’ needs is the key to providing effective customer service.

- **We believe in honesty.** No client should ever appoint an individual without being fully knowledgeable of the candidate’s complete background and history. Additionally, no candidate should ever enter into a new career opportunity without full disclosure of any organizational “issues.”
- **We keep everyone involved in the recruitment process informed.** Not only do we provide regular updates to our clients, we also have a reputation for keeping our candidates up to date.
- **We do not recruit staff from our client agencies** for another recruitment during an active engagement, nor do we “parallel process” a candidate, thereby pitting one client against another for the same candidate.
- **We do not recruit our placements — ever.** Should a placement of ours have an interest in a position for which we are recruiting, they may choose to apply. If they become a finalist, we ask that they speak to their supervisor to alert them of their intent.
- **We are retained only by cities, counties and special districts.** We are not retained by applicants or non-governmental agencies.
- **We do not over commit ourselves to too many searches.** Your recruiter maintains a small, limited number of concurrent searches at all times in order to focus specifically and diligently on recruiting qualified candidates for your vacancy.
- **We commit to diversity in its broadest possible definition in every aspect of each executive recruitment.** Peckham & McKenney has a well established reputation of placing women and people with diverse backgrounds.

EXPERIENCE



With our recruitment team that solely consists of retired City Managers, Police Chiefs, Assistant City Managers and Department Heads, and our expert support team, Peckham & McKenney brings more experience and knowledge of local government and executive search than any other California recruiter. Just a few of our most recent recruitments within the last year related to City Manager include:

- City Manager, City of Pleasant Hill, CA
- City Manager, City of Corcoran, CA
- City of Big Bear Lake, CA
- City of Fort Bragg, CA
- City Manager, City of Manteca, CA
- City Manager, City of Pleasant Hill, CA (current search)
- City Manager, City of Seaside, CA
- City Manager, City of Watsonville, CA
- County Executive Officer, Napa County, CA
- County Administrator, Solano County, CA
- County Administrative Officer, Mono County, CA
- Assistant County Administrative Officer/Human Resources Director, Mariposa County, CA

Please don't hesitate to contact these agencies as well as our large list of current and former clients on our website ([here](#)); they will attest to our quality of service, on-going communication throughout the process, personal and direct outreach and sourcing of candidates, quality applicant pool, written materials and interview facilitation.

As an ambassador of our clients, Peckham & McKenney is also known for maintaining ongoing communications with our applicants throughout the search process, treating every applicant with respect, and appropriately informing candidates to support their best effort. The numerous compliments we have received from applicants fairly illustrate this reputation as follows:

Comfortable and Professional Experience

“I’d like to thank you again for your support and guidance throughout the recruitment and selection process. It was a comfortable and professional experience, and I attribute a great deal of that to you. It’s my hope that our professional paths may cross again in the future.” **Candidate**

It really has been, “All about fit!”

“From the construction of the colorful candidate profile, to being responsive to phone calls, texts and my questions, I have been thoroughly impressed with the professionalism and approach of Peckham & McKenney. Maria Hurtado and Joyce Johnson have been the team that have shepherded my application through the municipal hiring processes, and I can speak highly for both of them. Should I need a recruiter to help fill a critical position in my new city, I will be calling on Maria Hurtado and Peckham & McKenney. And, by the way, it really has been, “All about fit!” **Candidate**

Straightforward, Friendly, and Humane Recruitment Process

“I wanted to let you know what a terrific job I thought you and Peckham & McKenney did on the recruitment. It was absolutely the most straightforward, friendly, and humane recruitment process I’ve ever participated in. And I would feel the same way even if the outcome was not successful for me.” **Candidate**

You Made Me Feel So Comfortable

“This is my first time working with a recruiting company, and I’m so happy for having the opportunity to work with your company, wow! I truly enjoyed the process! Your interview skills are amazing! You made me feel so comfortable and I felt like I was just talking shop with a longtime friend. Thanks for the personal touch that you include in your job, I believe that this is what makes your firm so desirable and successful.” **Candidate**

Testimonials from clients and candidates are at <https://www.peckhamandmckenney.com/testimonials>.

As references, please feel free to contact any of the following current and recent clients to inquire about their experience with Peckham & McKenney. In addition, we would be pleased to furnish the client contact and phone numbers for any past clients listed in this proposal.

Mali LaGoe, City Manager / **Amanda Armstrong**, Human Resources Manager

City of Scotts Valley, CA

(831) 440-5606 Mlagoe@scottsvalley.gov / 831-440-5613 aarmstrong@scottsvalley.gov

Dallin Kimble, County Administrative Officer / **Angela Nicholson**, Interim Human Resources Director

Mariposa County, CA

(209) 966-3222 dkimble@mariposacounty.org / (415) 305-4104 anicholson@mariposacounty.org

Sarah Monastes, Human Resources Director

City of Dublin, CA

(925) 833-6614 sarah.monastes@dublin.ca.gov

YOUR RECRUITMENT TEAM

Our Approach

With every Peckham & McKenney recruitment, your Recruiter has the entire Peckham & McKenney team of Recruiters and administrative personnel for backup, support, collaboration, and sourcing. *However*, when you retain Peckham & McKenney, *your Recruiter* serves as your single point of contact throughout the entire search process and is fully responsible for its success. Moreover, in order to fully focus on your search and finding applicants that fit with the ideal candidate you are seeking, your Recruiter also maintains no more than 6 active searches.

The Executive Recruiter for you in this search is Carl Cahill.



Peckham & McKenney Team

Carl Cahill, Executive Recruiter, Peckham & McKenney Executive Search

Carl has over 27 years of local government service. Carl worked for the Town of Los Altos Hills, California from 1999 until late 2021. He served as the Town's Planning Director from 2000 until February 2006 and was then appointed City Manager. Carl has a Bachelor's degree in Urban Studies from Montclair State University in New Jersey and a Master's degree in Public Administration from Cal State University, East Bay. He is a member of the American Institute of Certified Planners and the International City/County Management Association.



Carl is supported by the following [team](#).

Joyce Johnson, Operations Manager

Joyce Johnson joined Peckham & McKenney in 2005 and serves as the firm's Operations Manager. She has over 30 years' experience in the field of administrative and executive support for all aspects of the executive recruitment process. She oversees the internal administration of the firm as well as directing contract administrative support in the areas of advertising and design, web posting, and duplication and mailing services. Prior to joining Peckham & McKenney, Ms. Johnson oversaw internal administration in the Western Region headquarters of two national management consulting and executive recruitment firms. Ms. Johnson is complimented regularly on her strong customer orientation working with both clients and candidates alike. Ms. Johnson holds an Associate of Arts degree from American River College.

Taylor Bergstrom, Research Assistant

Taylor Bergstrom joined Peckham & McKenney in 2022 and currently serves as a Research Associate. Taylor is currently pursuing a PhD at UCLA where she worked previously as a lab manager overseeing various research projects. Prior to that, Taylor graduated from UC San Diego with a Bachelor of Science degree in Psychology.

Linda Pucilowski, Graphic Designer

With nearly 30 years of experience, Linda Pucilowski provides her expert design and marketing skills to Peckham & McKenney. She is the firm's "go-to" professional for all advertising and brochure design and creation. Ms. Pucilowski holds a Bachelor's degree from California State University, Sacramento.

Rachel Moran, Website & Social Media Assistant

Rachel Moran has been in the graphic design field since 2007 and prides herself on creating eye-catching visual art. She supports the Peckham & McKenney team by handling all website visual and technical design as well as social media. Ms. Moran graduated from the Art Institute of Houston obtaining her Bachelor's degree in Fine Arts with a concentration in Graphic Design.

Peckham & McKenney

"All about fit"

THE SEARCH PROCESS AND SCHEDULE

Peckham & McKenney is committed to finding the best fit for your position. Our process is 12 to 14 weeks and generally involves the following phases:

PROJECT ORGANIZATION (PRE-RECRUITMENT) – We will meet to discuss the search timeline, process and logistics for conducting a successful search.

DEVELOPMENT OF THE CANDIDATE PROFILE (2 WEEKS) – We will meet with agency members to listen to specific expectations of the position; learn the background and experiences desired in the ideal candidate; and understand the organizational culture and interests to create an attractive Candidate Profile marketing brochure.

RECRUITMENT (4 TO 6 WEEKS) – Our main focus in outreach will be direct, personal contact with quality potential candidates. Additionally, ads will be placed in industry publications and social media to broadly market the opportunity. Our client agency is continuously updated on our progress.

SUPPLEMENTARY REVIEW (2 WEEKS) – Upon our review of the resumes received, supplemental questionnaires will be sent to candidates who appear in most alignment with the Candidate Profile. Following a thorough review of the supplemental questionnaires, we will conduct preliminary telephone interviews. Internet research will also be conducted so that we may probe the candidate regarding any areas of concern.

RECOMMENDATION OF CANDIDATES/SELECTION OF FINALISTS (1 WEEK) – A report will be provided to the agency that includes, among a variety of documents, a full listing of all candidates for review and the materials submitted by candidates recommended for an interview.

INTERVIEW PROCESS (2 WEEKS) – Your recruiter will facilitate the interview process, inclusive of an orientation session at the beginning, and a discussion of candidates at the end.

QUALIFICATION (1 WEEK) – Once a finalist is selected, a reference check and thorough background check will be conducted. Assistance with negotiating compensation will also be provided.

COST OF SERVICES

The proposed fee to conduct the search process for your next City Manager is \$28,000. As our intent is to be competitive, we can discuss this further. This is an all-inclusive fee as described below to achieve success and retain us to personally and directly reach out and find candidates.

Peckham & McKenney is unique among recruiting firms for several reasons including having a fixed all-inclusive fee. We have found that an all-inclusive fee for the search process is simpler, cost-effective, and efficient.

The all-inclusive fee above includes professional fees and expenses (out-of-pocket costs associated with advertising, Recruiter travel, administrative support / printing / copying / postage / materials, telephone / technology, internet research checks on recommended candidates, and full background check on selected finalist only). For services not specified herein, we will discuss your interests and an appropriate fee.

PROCESS OF PAYMENT

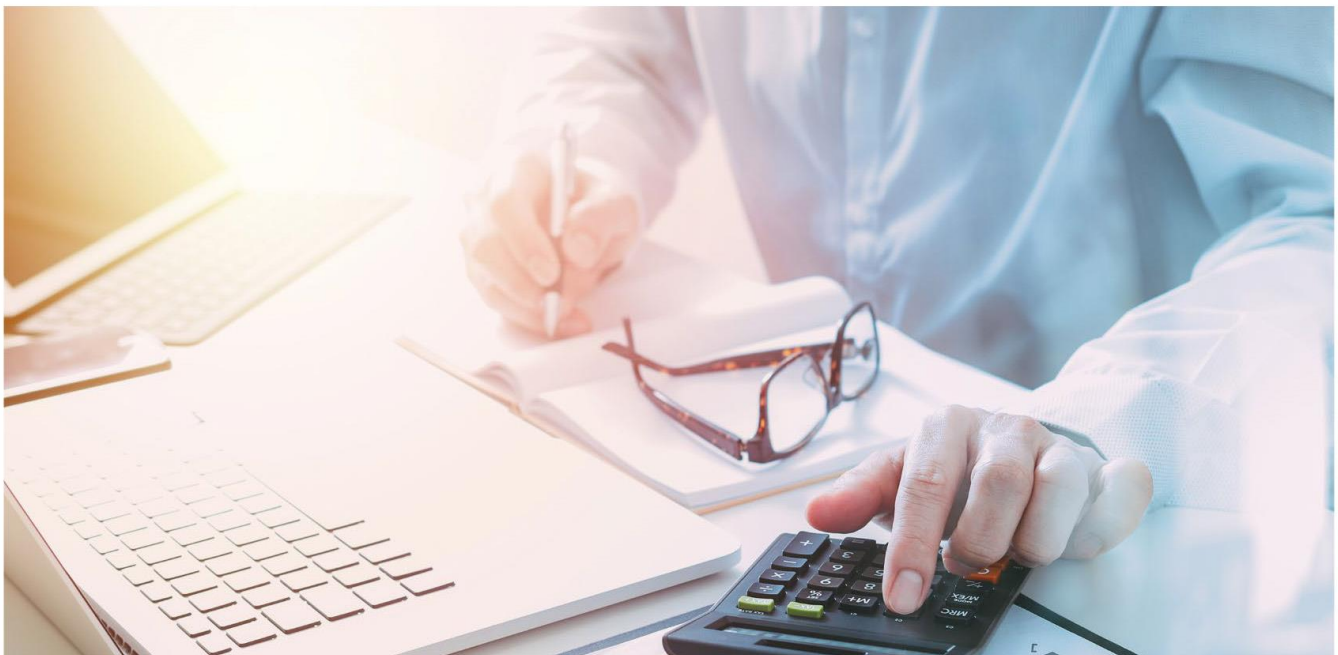
One-third of the all-inclusive fee is due as a retainer upon execution of the agreement. This retainer covers upfront and necessary expenses incurred by Peckham & McKenney on the City's behalf for the preparatory work and advertising. If the retainer is not received by Peckham & McKenney within 30 days of execution of the agreement, we will suspend the recruitment process until payment is received. The second one-third of the full payment will be invoiced 1 month from contract execution, and it is due within 30 days following the invoice date. The final one-third of the full payment will be invoiced 2 months from contract execution, and it is due within 30 days following the invoice date.

AGREEMENT

Peckham & McKenney is the operating name of City Management Advisors LLC, Anton Dahlerbruch, Managing Member.

INSURANCE

Peckham & McKenney carries Professional Liability Insurance (\$1,000,000 limit), Commercial General Liability Insurance (\$2,000,000 General Liability, and \$4,000,000 Products) and Automobile Liability Insurance (\$1,000,000). Our Insurance Broker is B&B Premier Insurance Solutions, Agoura Hills, CA.



GUARANTEE

We are pleased to share that the Peckham & McKenney success and placement record are particularly strong. We are confident that our recruitment process will result in a quality candidate that will stay in your employment.



OUR GUARANTEE:

- We will connect with you and our placement in 6 months and 1 year after the appointment to check-in.
- We will conduct a second search within 6 months of our search process if a candidate is not placed.
- If the placement vacates the position within 1 year from the date of accepting the offer (external candidates only and except in the event of budgetary cutbacks, promotion, position elimination, or illness/death, etc.), we agree to conduct a second search within 6 months of the vacancy.

The fee for a second search will be the cost of expenses (approximately \$8,000).

DIVERSITY STATEMENT



Peckham & McKenney is committed to diversity in its broadest possible definition in every aspect of each executive recruitment our firm provides. We take pride in the placement of women and applicants of diversity, and are known for long, successful tenures of candidates selected by the agency.

Peckham & McKenney does not discriminate on the basis of race, color, religion, creed, sex/gender, national origin/ancestry, disability, pregnancy, sexual orientation (including transgender status), marriage or family status, military status, or age. We are fully compliant with all applicable federal and state employment laws and regulations in all of our recruitments.

For over 30 years, founder Bobbi Peckham has been a champion of women seeking executive leadership positions within local government.

With our diverse team of Recruiters, Peckham & McKenney supports, promotes and advocates for diversity in the recruitment and hiring processes. In addition to our outreach methods, Peckham & McKenney routinely advertises with the National Forum of Black Public Administrators (NFBPA), Local Government Hispanic Network (LGHN) and CivicPRIDE as well as the National Diversity Network to ensure placement of your opportunity with the following online venues:

- African American Job Network
- Asian Job Network
- Disability Job Network
- Latino Job Network
- LGBT Job Network
- Retirement Job Network
- Veteran Job Network
- Women's Job Network



Peckham & McKenney
"All about fit"

THE COMMUNITY

Set amid rolling hills and woodlands in the East Bay area of San Francisco, Pleasant Hill is a modern, vibrant city offering the perfect balance of suburban amenities and small-town charm.

Located approximately 20 miles east of Oakland in Contra Costa County, the city is bordered to the south by Walnut Creek, the north by Martinez and Pacheco, the east by Concord, and the west by Lafayette.

Pleasant Hill's roots can be traced to a growing farming community in the 1880s and the opening of the Central Pacific Railroad through Diablo Valley in 1891. Population growth accelerated after World War II and the community gradually took shape as part of the suburban East Bay Area with residents firmly committed to creating a unique identity for Pleasant Hill. In 1961, Pleasant Hill was incorporated as a City. In 1964, Interstate 680 opened between Monument Boulevard and Willow Pass Road, completing the freeway from Oakland to Sacramento and bringing new opportunity for development. Today the city encompasses 8.1 square miles, is home to 34,613 residents, and still retains its strong sense of community.

Residents of Pleasant Hill enjoy an enviable quality of life with safe, quiet residential neighborhoods and an array of amenities. Its appealing downtown boasts more than 350,000 square feet of retail space, movie theaters, entertainment venues, restaurants, and a central plaza area for community gatherings and events. Its Mediterranean climate with warm, dry summers and mild winters makes the area ideal for visitors and residents seeking active outdoor activities. Numerous parks and trails are available for jogging, hiking, bicycling, skating, and horseback riding along with a variety of other recreational programs and sports facilities.

Numerous distinguished educational institutions serve Pleasant Hill. The **Mount Diablo Unified School District** operates the local K-12 public school system while several private schools also serve the community. Higher education institutions include **Diablo Valley College**.

Pleasant Hill is easily accessible with Interstate 680 running north/south, connecting the city with Highway 24 to Oakland, the Bay Bridge, and San Francisco. Bay Area Rapid Transit (BART) high-speed trains and local bus services, and nearby international

airports provide transportation options for residents, commuters and visitors.

To learn more about the City of Pleasant Hill, please visit www.pleasanthillca.org.

THE ORGANIZATION

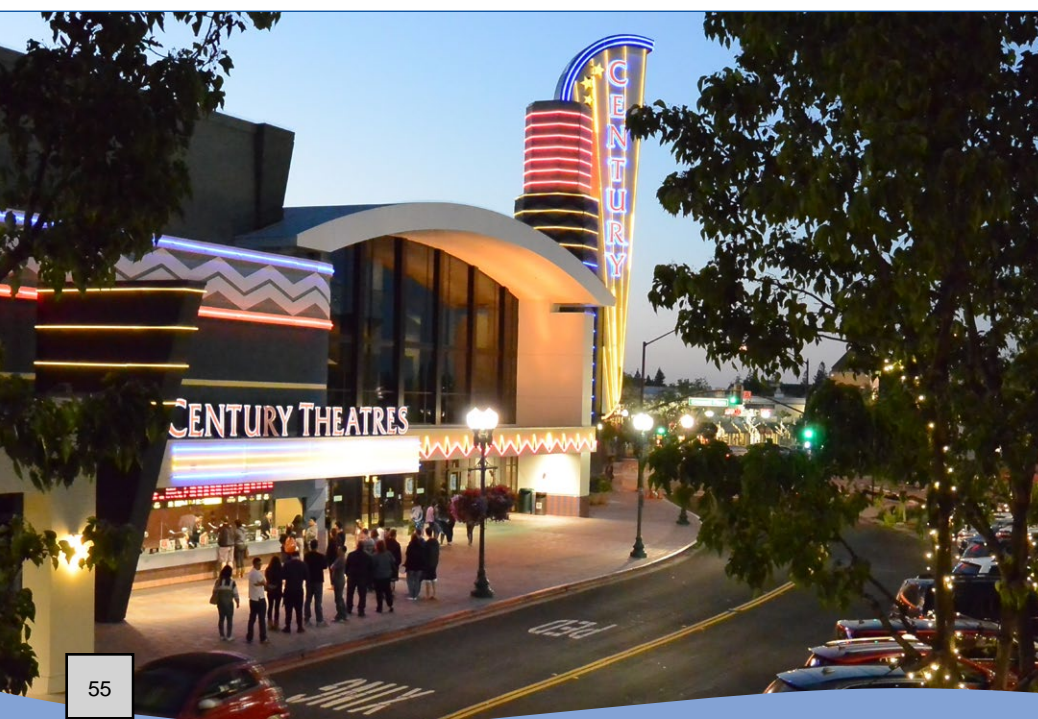
Pleasant Hill is a General Law City operating under the Council-Manager form of government. The City Council consists of five members who are currently elected at-large for staggered four-year terms. The Mayor and Vice-Mayor are elected by the Council from its own ranks and serve for one-year terms. The Council is the governing board of the City. It establishes the City goals and adopts policies to ensure the long-term health of the community. It provides responsible and representative local government to the residents, businesses, and organizations in Pleasant Hill and oversees the efficient and effective delivery of public services.

With a staff of 108 full time employees, the City delivers a range of municipal services including police, finance, building inspection, planning and code enforcement, engineering, economic development, street construction and maintenance, and storm drainage services. Fire protection, recreation and parks, sewage collection and treatment, water, and school services are provided through special districts not subject to City control.

Organizationally, the City is divided into five departments: City Manager's Office, City Attorney's Office, Police Department, and Community Development/Public Works.

The City Council goals for FY 2022/23 – 2023/24 are the following:

- A City that is safe;
- A City that is financially sound;
- A City that is attractive, well-planned, and well-maintained;
- A City that provides a high quality of life and a small-town atmosphere for its residents; and



- A City that provides efficient and effective public services.

The City operates on a two-year budget and is expecting that General Fund revenues will total \$29 million in FY 2022/23 and increase to \$29.9 million in FY 2023/24. General Fund expenditures are slightly higher than revenue.



MISSION STATEMENT

The City of Pleasant Hill is dedicated to maintaining a safe, pleasant environment within the community by providing effective governance and the efficient and professional delivery of public services

In the process of providing representative local government, the City identifies and anticipates concerns, problems and opportunities and takes actions to address them.

The City government is a catalyst for the involvement of residents, business, and organizations in the development and maintenance of a well-integrated community.

THE POSITION

The City of Pleasant Hill is seeking an experienced servant-leader who will continue the community focused service delivery provided by the talented staff who enjoy working in a stable and supportive organizational culture. This culture, as evidenced in part by a low staff turn-over rate, has been fostered and promoted through the effective

and caring leadership of June Catalano who is retiring after sixteen-years of service as City Manager for the City of Pleasant Hill.

The City Manager is responsible for ensuring implementation of the City Council's priorities and for providing sound and effective management of the City through the day-to-day management of all City operations, prioritizing, and organizing goals, developing, and monitoring work plans, communicating, engaging in the community, and appropriately allocating available resources.

THE IDEAL CANDIDATE

The City is seeking, in their next City Manager, a results-oriented decisive leader with solid ethics and integrity who has the ability through excellent communication and collaboration skills to educate, facilitate and help bring people and their interests together. The ideal candidate will have a strong knowledge base of California land use and planning principles, State housing law, and a general understanding of local economic development strategies, and prudent fiscal planning and management. Experience in working in a smaller city front line organizational environment is preferred. The ideal candidate also keeps an eye on the big picture and is adept at monitoring and interpreting pending legislative policy and its potential impact on the City.

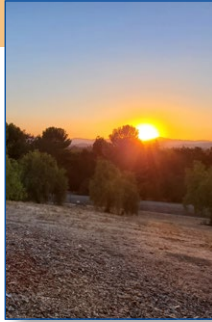
The new City Manager will be someone who can effectively utilize the skills of an experienced and high performing staff, encourages teamwork within the organization, and invites the staff to join in on creative problem-solving. The

ideal candidate for City Manager sets the foremost example for dedicated customer service and is a seasoned professional who maintains a poised and calm demeanor under pressure and proactively engages in a collegial fashion with staff, the Mayor and City Council, media, regional, State, and federal agencies, along with the Special Districts that serve Pleasant Hill and the community at-large.

The ideal candidate should be well practiced in personal accountability and transparency. The City Manager takes direct responsibility for when organizational goals and project timetables are not met and promptly advises the Council on administrative actions being taken to get back on course.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience, education and training that would likely provide the required knowledge and



C.

abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

EXPERIENCE: Eight years of progressively responsible experience in an administrative, managerial, or staff capacity in a municipal organization, involving responsibility for the planning, organization, implementation, and supervision of varied work programs. California experience preferred.

EDUCATION: Equivalent to a master's degree from an accredited college or university with major course work in public or business administration or closely related field.

LICENSE AND CERTIFICATES

Possession of, or ability to obtain, an appropriate California driver's license.

THE COMPENSATION

The annual maximum salary for the City Manager position is \$300,000 and appointment will be made depending on the qualifications and experience of the selected candidate. The City also offers an attractive benefits package including:



SEARCH SCHEDULE

Filing Deadline.....	April 28, 2023
Preliminary Screening of candidates	May 1–12, 2023
Recommendation of top candidates to City.....	Week of May 15, 2023
Finalist Interview Process with City Council.....	Week of June 5, 2023

These dates have been confirmed, and it is recommended that you plan your calendar accordingly.

RETIREMENT: CalPERS retirement plan for Classic members 2% @ 60. PEPR members, 2% @ 62. The City does not participate in Social Security.

MEDICAL PLANS: City pays 75% of Kaiser premium at each level. Blue Shield also offered. Medical in-lieu payment of \$400 per month or as a 457 Plan contribution. City paid Delta Dental and VSP Vision Plan.

FSA DEPENDENT CARE AND FSA HEALTH CARE: programs available

HEALTH SAVINGS RETIREMENT ACCOUNT: City contributes \$225 per month.

457 DEFERRED COMPENSATION PLAN

401(A): City contributes 3% of salary to ICMA account, employee may contribute up to 3%

LONG-TERM DISABILITY: City provided.

LIFE INSURANCE: City provided policy of up to \$300K.

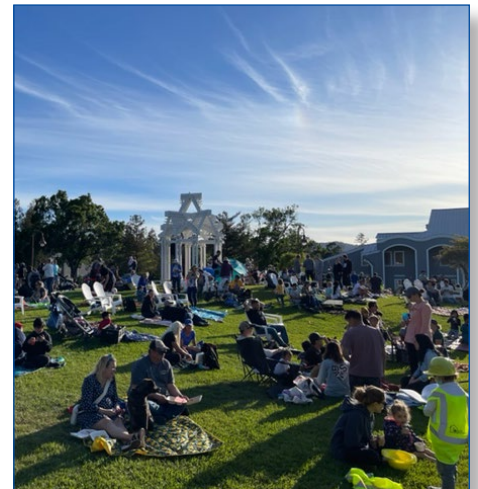
HOLIDAYS: 14 annual holidays

VACATION LEAVE: 12 to 25 days annually depending on length of service.

SICK LEAVE: 96 hours accrued annually, no cap.

ADMINISTRATIVE LEAVE: up to 16 hours a month, generally no carryover.

OTHER BENEFITS : annual education reimbursement of up to \$2,000, EAP.



THE RECRUITMENT PROCESS

To apply for this exciting career opportunity, please submit your cover letter and resume (including month/year of employment) via our website:

Peckham & McKenney
www.peckhamandmckenney.com

Please do not hesitate to contact Carl Cahill at 650-504-3515 or carl@peckhamandmckenney.com for questions regarding this position or the recruitment process.

**PECKHAM
&
MCKENNEY**
EXECUTIVE SEARCH

www.peckhamandmckenney.com



**WBCP
PROPOSAL**

RECRUITMENT SERVICES FOR



CITY MANAGER

JUNE 19, 2023

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COVER LETTER.....

June 19, 2023

Abby Partin
Human Resources Administrator
50 Park Place
Brisbane, California 94005



RE: City of Brisbane – City Manager Recruiting Services

It is our pleasure to submit this proposal for recruitment services to secure your ideal candidate to serve as the City Manager of the City of Brisbane. **WBCP has worked on many City Manager recruitments, and we look forward to the opportunity to partner with City of Brisbane on this critical position!**

We trust our proposal will showcase our client-focused recruitment process and will act as a testament that we are passionate about what we do to make our clients happy.

It has been proven that great employees are looking for great employers, not just a paycheck. WBCP provides a broader perspective to recruitment services – going beyond securing the ideal candidate – we brand your organization as an employer of choice. We use eye-catching marketing materials, innovative search practices, and responsive and respectful communications with your applicants and stakeholders. **We guarantee we will fill your position, and we guarantee that placement for 24 months.** We provide a fair and equal recruitment process that also focuses on attracting ethnic and gender-diverse applicant pools.

WBCP is talented at working with you to identify the strengths, challenges, and opportunities of this job, the ideal candidate, and your community and organizational culture. WBCP will work with your stakeholders to design a recruitment strategy that will include a customized engagement process. We will have a series of meetings, discussions, stakeholder interviews, and survey(s) to get to know you, the organization, the community, the culture, and the staff whom the future City Manager will lead.

My team and I know the California candidate marketplace and have many clients in your region, such as the **City and County of San Francisco, County of San Mateo, First 5 San Mateo, City of San Rafael, City of Milpitas, Oakland Housing Authority, and Valley Water (just to name a few)**. We have exceptional experience successfully recruiting for City Manager positions, with several of our recent notable recruitments including, but not limited to:

- City Manager – City of Sonoma, CA
- City Manager – City of Port Hueneme, CA
- City Manager – City of Dunsmuir, CA
- City Manager – City of Pasadena, CA

To see a list of Organizational Leadership recruitments, visit pages 5–6 of this proposal, and to see a full list of our clients and successful recruitments, visit: <https://tinyurl.com/2p96hv8d>

Sam Sackman and/or I will be the lead on this recruitment. I lived in California for over 35 years and have over 20 years of experience in executive search services, six years of which were working for the County of Orange, and I have owned and operated WBCP since 2004. Sam Sackman spent the latter part of her career working directly for Valley Water in the Executive Office gaining a deep understanding of the inner workings of executive-level positions. WBCP now has offices in Oregon, Washington, and California, including two offices in the South Bay Area, the Greater Sacramento Area, and Central California.

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I. COVER LETTER.....

WBCP, Inc. staff are experts in the virtual recruitment process. We are providing these services seamlessly and will be able to effectively support a virtual recruitment process or coordinate COVID-compliant in-person interviews and/or hybrid virtual and/or in-person interviews; WBCP is willing to travel during COVID.

Recruiting top talent has become the number-one topic among administrators. New and innovative recruitment strategies are critical to identifying and securing candidates with a deep understanding of how to assess and meet community needs and address future challenges. WBCP understands the complexity of community leadership, and we are prepared to provide a thorough, complete, and fair recruitment process to provide a diverse applicant pool. **Upon our 2022 year-end review, we found that over the last three years, 69% of our applicants and 70% of our candidates placed in leadership positions with our clients came from diverse backgrounds.** In fact, because of our ability to reach diverse applicant pools, we were hired by two national Latino organizations to recruit for an Executive Director and other leadership positions: Latino Public Broadcasting and Radio Bilingüe (two of the largest Latino national nonprofit organization in the U.S.).

Clients choose our firm over others because of our ability to work with your support staff and stakeholder group (including boards, appointed/elected officials, and engaged constituents), manage all details of a recruitment process, and secure great candidates. Our dedication and commitment to the client are complemented by our deep understanding and ability to effectively navigate challenging political climates.

Our clients have great things to say about the quality of the service we provide and the amazing candidates we find them, In fact, many of our clients are return customers. Please feel comfortable reaching out to these organizations to get their feedback directly.

Lastly, I love what I do, and I am passionate about finding exceptional candidates who are also passionate about serving others. My staff and I are driven and desire to exceed client expectations. I appreciate your consideration in retaining our services and hope to have an opportunity to work with you in the future.

Best Regards,



Wendi Brown | Founder/President, WBCP, INC.

wendi@wbcpinc.com | 541-664-0376

www.wbcpinc.com

DIVERSITY

70%

*of WBCP candidates
placed in leadership
positions come from a
diverse background*

C.

II. BACKGROUND & QUALIFICATIONS.....

Principal: Wendi Brown, President

Company Legal Name: WBCP, Inc.

Tax ID: 81-5454037

Website: www.wbcpinc.com

Phone: 866-929-WBCP (9227) / 541-664-0376

Address:

- **California Main Office:** Roseville, CA 95661
- **Oregon Main Office:** 213 E Main St., Rogue River, OR, 97537
- **Washington Main Office:** 15405 Des Moines Memorial Drive, #G303, Burien, WA 98148
- **Satellite Offices (4):** San Jose, CA; Nipomo, CA; Corvallis, OR; Gilroy, CA



WOMEN OWNED

WBCP, Inc. is a 100% woman-owned business, an S Corporation, not part of a parent company, and is a registered small business through the U.S. Small Business Administration (SBA). WBCP is registered to do business in California, Oregon, Washington, and Arizona and soon expanding in other states. WBCP files and pays California S Corp and personal income taxes.

BUSINESS HISTORY

WBCP, Inc. has been in business since 2004, and serves nonprofit and public sector organizations. WBCP offers a variety of services, including: partial and full service search services for individual contributor, supervisor, management and executive management positions; human resources consulting: organizational development, training, classification and compensation studies, analysis and assessments, etc.

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II. BACKGROUND & QUALIFICATIONS.....

WBCP has over 20 years of experience providing search services for public sector and non-profit organizations. We have successfully secured professionals and provided other consulting services in California, Arizona, Colorado, Idaho, Oregon, and Washington.

California, Arizona, Oregon, and Washington Cities of: Arcata, Ashland (OR), Astoria, Berkeley, Calistoga, Central Point (OR), Ceres, Chandler (AZ), Culver City, Davis, Dunsmuir, Duvall (WA), Fremont, Fresno, Grants Pass (OR), Gold Hill (OR), Hemet, Hubbard (OR), Independence (OR), Irvine, Laguna Beach, Larkspur, Lincoln, Livermore, Long Beach, Medford, Milpitas, Napa, Oakland, Oxnard, Palo Alto, Pasadena, Petaluma, Phoenix (AZ), Phoenix (OR), Port Hueneme, Redding, Riverside, Roseville, Rogue River (OR), Sacramento, San Francisco, San Rafael, Santa Maria, Santa Paula, Santa Rosa, Solvang, Sonoma, Truckee, Ventura, Vernon, Victorville, and Windsor.

California, Colorado, Idaho, Oregon, and Washington Counties of: Alameda, Colusa, Contra Costa, El Paso (CO), Fresno, Humboldt, Jackson (OR), King (WA), Lake, Lane (OR), Los Angeles, Marin, Mariposa, Mendocino, Merced, Mono, Napa, Orange, Riverside, Sacramento, San Benito, San Bernardino, San Mateo, San Francisco, San Joaquin, San Luis Obispo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Solano, Sonoma, Stanislaus, Tuolumne, Yuba, and Yolo.

Local and National Councils, Boards, and Districts: Boulder Creek Protection District, California Prison Industry Authority (CALPIA), Cosumnes Community Services District, Hass Avocado Board (HAB), Jackson County Fire District 5, Los Angeles County Employees Retirement Association (LACERA), Nevada Irrigation District, Newark Chamber of Commerce, North American Blueberry Council/U.S. Highbush Blueberry Council (NABC/USHBC), Oakland Housing Authority, Olivehurst Public Utility District, Placer County Transportation Planning Agency (PCTPA), Sacramento Area Flood Control Agency (SAFCA), Sacramento Employment & Training Agency (SETA), Sacramento Public Library Authority, Sacramento Sewer District, Sacramento Suburban Water District, San Benito Council of Governments, San Diego Port Authority, Tri-City Mental Health Authority (TCMHA), Truckee-Donner Public Utility District (TDPUD), Tuolumne Utilities District, and Valley Water.

Nonprofit and Joint Powers Authorities (JPAs): CDS Publications, Center Point, Central California Legal Services (CCLS), Community Food Bank, Community Works, Dogs for Better Lives/Dogs for the Deaf, First 5 (Alameda County, California Association, Fresno, Santa Barbara County, San Mateo), Futures Without Violence (Family Violence Protect Fund), Gold Coast Health, Greater Richmond Interfaith Program (GRIP), La Public Media, Latino Public Broadcasting, Northern Valley Catholic Social Service (NVCSS), Options Recovery, Radio Bilingüe, Santa Cruz County Animal Services Authority, Teton County Joint Housing Authority (TCJHA), Transitions-Mental Health Association, Valley Consortium for Medical Education (VCME), and Water Forum.

Private Organizations: Central California Truck and Trailer, Morton & Pitalo, NAVA, SWEED, Touchstone Accounting

Consulting services (classification and compensation services, competency modeling, job description development, job family development, job analysis): City of Fremont, City of Medford, City of Santa Maria, City of Santa Paula, County of Humboldt, County of Mariposa, County of Santa Barbara, and County of San Luis Obispo.

INDUSTRIES

- | | | |
|--|--|---|
| <ul style="list-style-type: none"> • Organizational Leadership • Economic Development • Facilities & Operations • Financial, Administrative Services, Accounting, Auditing • Health & Human Services, Housing, Unhoused | <ul style="list-style-type: none"> • HR, Risk, Labor/Employee Relations • Information Technology • Legal, Counsel, Clerk • Library • Marketing, Communications, PR • Parks & Rec, Community Services, Arts | <ul style="list-style-type: none"> • Planning, Environmental, Community Development, Building, Transit • Public Safety • Public Works, Transportation, Engineering |
|--|--|---|

II. **C. BACKGROUND & QUALIFICATIONS**.....

BELOW IS A LIST OF SIMILAR RECRUITMENTS WBCP HAS SUCCESSFULLY MANAGED:

ORGANIZATIONAL LEADERSHIP

- City Manager, City of Port Hueneme, CA
- City Manager, City of Pasadena, CA
- City Manager, City of Ceres, CA
- City Manager, City of Santa Rosa, CA
- City Manager, City of Gold Hill, OR
- City Manager, City of Pasadena, CA
- City Manager, City of Sonoma, CA
- City Manager, City of Petaluma, CA
- City Manager, City of Phoenix, OR
- City Manager, City of Dunsmuir, CA
- City Manager, City of Oxnard, CA
- City Manager, City of Ventura, CA
- City Manager, City of Independence, OR
- Town Manager, Town of Truckee, CA
- Town Manager, Town of Windsor, CA
- City Administrator, City of Rogue River, OR
- City Administrator, City of Hubbard, OR
- City Administrator, City of Duvall, WA
- County Executive Officer, County of Shasta, CA
- Assistant City Manager (Public Safety), City of Sacramento, CA
- Assistant City Manager (Municipal Services), City of Sacramento, CA
- Deputy City Manager, City of Long Beach, CA
- Chief Executive Officer, CalPIA (California Prison Authority), CA
- Chief Executive Director, Valley Consortium of Medical Education, CA
- Executive Director, Water Forum, CA
- Executive Director, Teton County Joint Housing Authority, ID
- Executive Director, Placer County Transportation Planning Agency, CA
- Executive Director, Options Recovery Services, CA
- Executive Director, Latino Public Broadcasting, CA
- Executive Director, First 5 Association of California, CA
- Executive Director, First 5 Santa Barbara County, CA
- Executive Director, First 5 Fresno, CA
- Executive Director, San Benito Council of Governments, CA
- Executive Director, Northern Valley Catholic Social Service, Redding, CA
- Executive Director, Community Food Bank, CA
- Executive Director, Greater Richmond Interfaith Program, CA
- Executive Director, Tri-City Mental Health Authority, CA

II. BACKGROUND & QUALIFICATIONS.....

ORGANIZATIONAL LEADERSHIP (CON'T)

- Executive Director, Sacramento Employment and Training Agency, CA
- Executive Director, Arts Commission, County of Santa Barbara, CA
- Executive Vice President, Center Point, CA
- Vice President/Business Development Director, WBCP Inc., OR
- ACEO - Assistant County Executive Officer, County of Napa, CA
- ACEO - Assistant County Administrative Officer, County of Santa Barbara, CA
- ACAO - Assistant County Administrator, County of San Joaquin, CA
- ACAO/HR Director, County of Mariposa, CA
- Assistant Executive Director, First 5 San Mateo, CA
- Chief Operating Officer, IT and Administrative Services, Valley Water, CA
- Chief Operating Officer, Water Utility Enterprise, Valley Water, CA
- Chief Operating Officer, Futures Without Violence, CA
- Chief Operating Officer/Executive Director, Valley Consortium for Medical Education, CA
- Chief Operating Officer, WBCP Inc., OR
- General Manager, Olivehurst Public Utility District, CA
- General Manager, Tuolumne Utilities District, CA
- General Manager, LA Public Media, CA
- General Manager, Radio Bilingüe, CA
- General Manager, Santa Cruz County Animal Services Authority, CA

Check out our full list of
recruitments here:

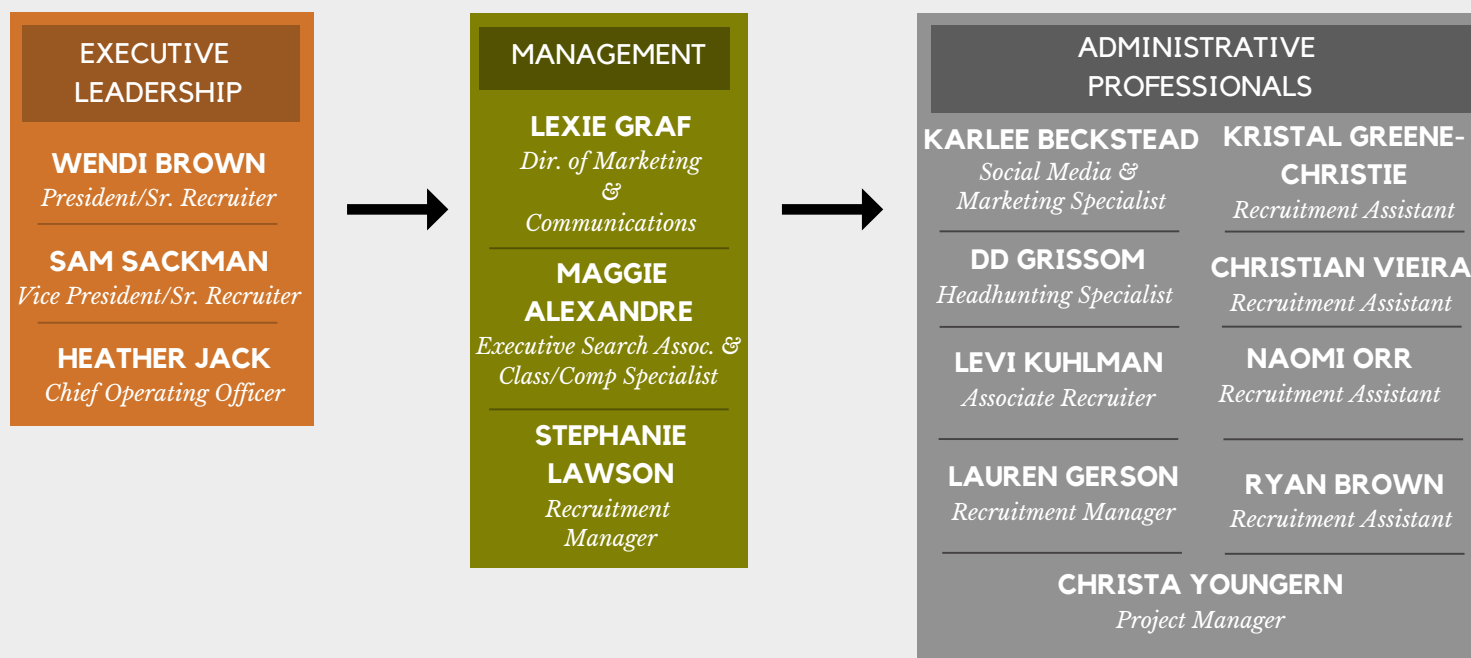
<https://tinyurl.com/2p96hv8d>

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GUARANTEE.....

- (1) We guarantee successful placement and will provide continued consulting services for one additional recruitment/replacement (however, client will pay for any additional direct cost expenses).
- (2) If a candidate selected and appointed by the Client terminates employment for any reason before the completion of the first **24 months** of service, WBCP will provide the Client with the necessary consulting services required to secure a replacement. Professional consulting services will be provided at no cost to the Client; however, additional expenses will be covered by the Client. The Guarantee is valid for one recruitment/replacement only.
- (3) **Work Performed Out Of Scope:** To provide the best results for our clients, we strongly recommend a steadfast commitment to agreed-upon dates/times for critical recruitment milestones (shortlist meeting and interview dates). Any change of date and time initiated by the client after a recruitment is rolled out may result in a forfeiture of the recruitment guarantee. Any work performed after the recruitment has been rolled out and dates have been agreed upon – to adjust these dates or times will result in additional charges at our hourly rate.

IV. ORGANIZATIONAL CHART.....



Confidential

STRATEGIC PARTNERS

BILL LANDIS <i>Public Safety Investigator</i>	CHRISTY WURSTER <i>Sr. Facilitator</i>	RIVKAH SASS <i>Retired Library Director/Sr. Facilitator</i>	SUSAN KLIEN-ROTHSCHILD <i>H&HS Expert/Sr. Facilitator</i>	WILLIAM RACOWSCHI <i>Fire/Public Safety Expert</i>	MIKE LUKEN <i>Executive Leadership, Transportation, Facilities</i>	CARL CROWN <i>HR & Organizational Development Director</i>	PATRICK DUTERTE <i>Sr. Facilitator</i>	NITISH SHARMA <i>Sr. Facilitator</i>
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WBCP STATISTICS

V. WBCP KEY STAFF.....

WENDI BROWN*Lead Consultant/Recruiter*

I am the President of WBCP, an executive search and human resources consultancy, serving clients in Oregon and California. My team and I are passionate about helping organizations improve their recruitment services, place great talent, conduct department assessments, redesign antiquated processes, revise job descriptions, conduct salary and benchmark studies, and more. I have over 20 years of experience in marketing and advertising and combine this with my background in recruiting to successfully place hard-to-fill, management, and executive positions. I have worked in various industries – advertising and public relations, national real estate franchisor, global manufacturing – and I have worked with nonprofit and public sector organizations since 1999. Formerly, I was an internal Human Resources Consultant for the County of Orange, California, providing countywide communications, human resources, executive search, and recruiter training services to the Assistant Chief Executive Office/Human Resources Director and, at that time, 25 decentralized departments, with 17,000 employees, serving a community of 300,000. I have a Bachelor's of Science in Business Administration with an emphasis in Marketing from Colorado Technical University; have earned several certificates in Project Management, Global Business, Marketing, and Human Resources; and working towards a Master's in Management at Southern Oregon University

SAM SACKMAN*Vice President/Recruiter*

Sam is WBCP's Vice President and is part of WBCP's executive leadership team. Sam has a wealth of business and public sector experience and brings in-depth analytical and project management skills and experience supporting executive leadership with special projects, program development, contracts and administration, and executive recruitment support. Prior to joining the WBCP team, she spent five years working at Valley Water (formerly Santa Clara Valley Water District) where she was an expert in leading complex projects and organizational change management practices supporting the CEO, Chief Officers, and various departments, such as Facilities, Contracts, Human Resources, and Government Affairs. She brings a wealth of knowledge of the inner workings of government agencies, political sensitivities, and their recruitment policies and processes. Sam has a Master's in Anthropology with an emphasis in Program Development, and an undergraduate degree in Anthropology with an emphasis in Sociology and Behavior-driven Health from Creighton University.

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WBCP KEY STAFF.....**HEATHER
JACK***Chief Operating Officer*

Heather Jack is WBCP's Chief Operating Officer and lead Project Manager. Since starting at WBCP in 2015, she has grown into an integral part of the business. Heather uses her strong organizational skills and attention to detail to support all recruitments from start to finish, coordinate timelines, oversee the team's productivity. Meeting clients' deadlines and major milestones is one of Heather's top priorities, making her our go-to person for all things calendar and project management-related. Heather also assists with projects in human resources with several municipalities in Oregon and California. Other aspects of her role include supporting employee engagement, salary and benchmark studies, and business operations. During her time at WBCP, Heather has modernized processes and scaled technology systems for the company. Prior to working with WBCP, Heather worked at Hannon Library, developing organizational, research, and interpersonal skills. Heather has a Bachelor of Science degree in Anthropology and a double minor in Environmental Studies and French from Southern Oregon University.

LEXIE GRAF*Director of Marketing &
Communications*

As a marketing professional, Lexie has been primarily focusing on copywriting, content creation, and brand strategy in her career. She has a knack for understanding each clients' unique needs, allowing her to adapt her writing voice and branding as needed. Along with developing and overseeing the creation of social media, marketing materials, and advertising plans for WBCP, Lexie collaborates with the recruitment team in meeting clients' needs and deadlines. Before WBCP, Lexie wrote for Indeed and the University of Wisconsin Colleges, helping her develop a deep understanding of career development, recruitment, and public sector careers. Throughout her marketing career, Lexie has produced a wide variety of campaigns and deliverables, such as blogs, digital and print ads, website content, brochures, social media posts, eBooks, and magazines. Notable projects throughout her career include developing content for two websites and collaborating on an email marketing campaign that won an American Advertising Award in multiple categories. Lexie has a Bachelor's in Communications with certificates in Digital Studies and Environmental Studies from the University of Wisconsin – Madison.

**STEPHANIE
LAWSON***Recruitment Manager*

Stephanie started working for WBCP in 2019. She acts as support for all facets of the recruitment process, as well as any other tasks to assist the WBCP team. Some of her core responsibilities include candidate and panel coordination, candidate review, calendar and timeline management, and interview material preparation. Prior to working for WBCP, Stephanie had several roles in hospitality where she further developed her client relations, communications, and clerical skills. Stephanie has a Bachelor's of Science degree in Business Administration with a focus in Hospitality from Southern Oregon University.

LAUREN GERSON*Recruitment Manager*

Lauren serves as one of WBCP's recruitment managers and supports the full cycle of the recruitment process. She began her career managing operations and events for award-winning breweries and restaurants in Portland, Oregon, before pivoting to business operations and career services. Prior to joining the WBCP team, Lauren worked with a career coaching and workforce development company, helping jobseekers facing barriers to employment. Lauren brings to WBCP her experience in project management, client relationship management, resume writing, as well as HR operations and risk management. She holds a Bachelor's degree in Philosophy with a minor in English Literature from Whittier College.

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V. WBCP KEY STAFF.....

**MAGGIE
ALEXANDRE***Executive Search
Assoc. & Class/Comp
Specialist*

Maggie Alexandre is a Human Resources professional with over 30 years of experience, and is WBCP's key Executive Search Associate and Classification and Compensation Specialist for WBCP since 2018. Prior to working at WBCP, Maggie was a Human Resources Director in the San Francisco Financial District and led an 80 person team of human resource professionals. She began her career in HR at Robertson, Stephens & Company, a boutique investment bank, and continued in the HR Director role at other investment banks and private equity firms until 2016. Maggie studied Anthropology at California State University, Long Beach and received her Human Resources Management Certificate from California State University, San Francisco.

**CHRISTA
YOUNGERN***Project Manager*

As a Project Manager, Christa supports the full cycle of the recruitment process from candidate review and copywriting to interview facilitation and candidate coordination. Prior to joining WBCP, Christa worked in higher education where she recruited blue-chip athletes, built multiple championship teams, and managed complex and politically sensitive projects. She brings an incisive interpersonal skillset as well as deep experience in organizational change management and leadership. Her talent for identifying the oft intangible elements that make a person successful in their role makes her an asset to our clients. Christa has Bachelor of Arts degrees in both Political Science and English from California Lutheran University as well as a Master of Arts degree in Education from Whittier College.

LEVI KUHLMAN*Associate Recruiter*

Levi serves as WBCP's Associate Recruiter and plays an integral role in managing our recruitments and clients. Some of his primary duties include meeting with clients, screening candidates, preparing for interviews, leading headhunting efforts, and overseeing candidate coordination. Levi's strong interpersonal skills coupled with his eagerness to work with others helps him create lasting relationships with clients and candidates. Prior to his time with WBCP, Levi was the President of a real estate company where he oversaw a residential real estate team in the Willamette Valley, Oregon. In addition to the great work he does for WBCP, our clients, and our candidates, Levi also operates a small catering company on the side. Currently, Levi is dually enrolled at Oregon State University and Western Governors University pursuing his MBA/MPA.



C.

RECRUITMENT STRATEGY / PHASES.....

WBCP knows how to customize your search strategy to meet your unique recruitment needs. We customize your recruitment based on the specific needs, target audience, and challenges for each recruitment; however, below is a baseline approach for most recruitments.

CLIENT & STAKEHOLDER MEETINGS

We require the Client and/or Search Committee, and other stakeholders identified by the Client, be involved in the initial and final phases of this recruitment. These are critical phases to ensure we obtain a clear sense of the priorities and the successful hire of the right candidate. WBCP will meet with various stakeholders as warranted by the Client and the level of the position in the organization. These meetings will allow us an opportunity to gather information and gain knowledge about the organization, community, and unique aspects of the recruitment to design the ideal candidate professional profile, advertising materials, and strategic approach

FEEDBACK OUTCOME / TIMELINE DEVELOPMENT

Following the Client/stakeholder meetings, we will develop a detailed timeline for the recruitment along with a proposed advertising plan for approval.

CREATIVE DEVELOPMENT

Immediately following the client feedback activities, we will draft the competencies for the recruitment and advertising material/recruitment brochure for the Client's review. This information will summarize what was learned from Client-related interviews and will be used to advertise the opening.



MARKETING STRATEGY & IMPLEMENTATION

WBCP will execute a customized marketing/ad plan once the job announcement is created. An ad plan could include the following (based on assumptions), and will be customized based on information gathered in Phase I:

ONLINE ADVERTISING – Including local and national job boards, associations, social media, and other industry-related job postings targeting ideal candidates; job boards that reach a desired geographic area and reach a diverse ethnicity.

E-DIRECT MAIL ADVERTISING – including WBCP's current database of potential applicants, we have access to other professional lists and will source more lists through associations, contacts, etc.

SOURCING/HEAD HUNTING – WBCP will contact individuals targeted and generate new contacts through referrals made by respected sources.

WBCP is a LinkedIn recruiter and we have access to over 350 million profiles via LinkedIn to assist us in targeting ideal candidates.



COMMUNICATION WITH CLIENT

WBCP will provide weekly updates on the progress of this search unless the client requests more or less frequent communications. We tailor our communications in accordance with our Client's needs.

C.

RECRUITMENT STRATEGY / PHASES.....

RESUME ASSESSMENT

WBCP will review resumes as they are received and/or at the close of the recruitment. Those candidates determined to be the most highly qualified will be selected for a screening interview.

SCREENING INTERVIEWS / REPORT TO CLIENT

WBCP does not restrict the number of applicants or candidates to be screened.

Rather, we interview candidates who meet our ideal candidate criteria; frequently this group amounts to 20 candidates, or on average 20% of the applicant pool. Following the completion of the phone screen interviews, we will develop a report/recommended shortlist of candidates, which includes: resumes, cover letters, and a one-page profile summary of candidates' professional history, including a brief overview of WBCP's assessment and the results of their phone screen. We will meet with the selection committee/Client to review this report and select candidates for interviews. In this meeting, we will review the recruitment plan and discuss the final stages of the selection process.



COMMUNICATION WITH CANDIDATES

WBCP will take responsibility for communicating with the applicants/candidates during each phase of the search process and Client should refer any inquiries from potential or existing applicants directly to WBCP.

SELECTION PROCESS

WBCP will design and administer an appropriate final selection process based on the needs of the Client (tailored to the need and recruitment). WBCP will facilitate the invitation and coordination of these meetings/interviews and provide additional assessment tools/recommendations such as interview questions, writing and presentation exercises, problem solving scenarios, etc.

COMMUNICATION WITH CLIENT

Following the interviews and the Client's top candidate(s) selection, we will assist the Client with facilitating a thorough background and reference check. A typical approach includes a review of federal, state, and local criminal background checks and academic verification by a licensed background agency. Reference checks are conducted over the phone by a senior consultant and a final report is provided to the Client. References are completed on candidate(s) being considered after initial/panel interviews.



NEGOTIATIONS

Once the client reviews and is comfortable with the findings in the background and reference report, we are available to assist with negotiations on compensation, benefits, start date, and other transition details.

PLEASE NOTE: Due to COVID-19 Guidelines, WBCP, Inc. is committed to providing services listed herein, typically these services are executed in-person, however, we will facilitate all services virtually as needed and have successfully managed many virtual and hybrid interviews (partial in-person/part virtual) since March 2020 for our clients.

C.

VII. SCOPE OF WORK.....

- Facilitate initial kick-off meeting with Client and other meetings that may include Executive Leadership, staff, community, and other stakeholders to assist with identifying the ideal candidate profile.
- Assist Client hiring authority/stakeholders in modifying the job description (as needed), and develop a recruitment announcement, marketing materials, and advertising plan for the recruitment.
- Attend all other meetings and engagements as needed or identified by the Client.
- Implement advertising plan including: publication, headhunting, direct mail, and other online and email marketing efforts.
- Provide timely updates and progress reports to the client regarding search services; every two weeks or as Client identifies is needed.
- Preliminary internet searches will be conducted on recommended candidates.
- Coordinate interview panel(s) as needed, or coordinate this process with Client.
- Receive and review applicants and screen those applicants to identify top candidates. Top screened paper applicants will be video/phone screened by recruiter to identify the key competencies (technical and interpersonal) to assist in identifying the top group of candidates who will be recommended at the Client/WBCP shortlist meeting.
- Facilitate shortlist meeting with Client – review and select candidates who will be invited to interview.
- Coordinate invitations to candidates.
- Develop interview questions and other selection details to meet specific needs and identify key competencies of candidates.
- Facilitate interviews with panel(s).
- Background and reference checks will be conducted with candidates who are identified as final candidates after initial Client interviews have been conducted. Background checks will typically include the following: criminal (local, state, and federal), education, credit, social security. References will be conducted based on a 360-degree perspective and will include staff, peers, and superiors. Onsite background services are available at an additional fee (see fees for details)
- Facilitate offer and negotiations with selected candidate; as directed by Client.

C.

III. RECRUITMENT TIMELINE.....

BELOW IS A SAMPLE OF AN EXECUTIVE SEARCH TIMELINE THAT WBCP WILL CUSTOMIZE FOR THIS RECRUITMENT

Week 1:

- Secure services with search firm, WBCP, Inc.
- WBCP: review search parameters and recruiting processes with Client
 - Interview with hiring authority and other stakeholders for competencies
 - Identification of advertising venues and ideal candidate prospects
 - Calls, meetings, or coordination with other stakeholders for information gathering

Weeks 1 + 2:

- Develop and approvals: recruitment process, deadlines, ad plan and strategy, recruitment timeline and brochure
- Print coordination (if applicable)

Weeks 2 + 3:

- **OPEN RECRUITMENT AND AD PLAN:** Implement marketing plan and direct mail (if applicable)
- Secure panel member calendars
- Timeline may be extended if direct mail piece is included (i.e., print/postage)
- Finalize panel members and interview logistics and invitations to panel members

Weeks 4, 5, + 6:

- Receive applications –Collect and source applicants will continue until recruitment closes

Weeks 7 + 8:

- **CLOSE RECRUITMENT AND ADVERTISING**
- Conduct initial phone screen to identify shortlist of candidates
- Preliminary check on shortlist candidates (Google search)
- Candidate profiles developed and short list recommendations to client

Weeks 9 + 10:

- **MEETING – Client confirms selection of candidates to be advanced to panel interviews**
- Finalize questions, presentation, in-basket (as determined)
- Coordinates invitations with selected top candidates (shortlist)
- Produce panel candidate interview packets

Weeks 10 + 11:

- WBCP facilitates interview process – Interview process will be customized based on client and community needs:
 - **Day 1: Panel Interviews Conducted; Day 2: 2nd Interviews with executive leaders;**
 - 3rd interviews may be scheduled as needed with Boards/Commissions, etc.;
 - As needed schedule staff and/or community discussions/meetings

Week 12:

- WBCP conducts background and reference checks (backgrounds may be conducted by Client if current contract exists)
- WBCP conducts full reference checks for candidate(s) selected for Board/Commission interviews; or when Client is interested in making an offer

NEGOTIATIONS / HIRE:

- Hire date to accommodate possible candidate relocation
- Client (WBCP available to assist in process) conducts offer and facilitates salary negotiations with preferred candidate

C.

REFERENCES.....

1-City of Santa Rosa, California

Positions Filled:

- City Manager

Contact Information:

- Chris Rogers, Mayor - crogers@srcity.org | 707-543-3017
- Natalie Rogers, Vice Mayor - nrogers@srcity.org | 707-494-8378
- Maraskeshia Smith, City Manager - msmith@srcity.org | 513-256-1673

2-City of Pasadena, California

Positions:

- City Manager

Contact Information:

- Tiffany Jacobs-Quinn, Human Resources Director - tjacobsquinn@cityofpasadena.net | 626-744-4126

3-City of Petaluma, California

Positions Filled:

- City Manager

Contact Information:

- Peggy Flynn, City Manager - pflynn@cityofpetaluma.org | 707-778-4345

X. MARKETING MATERIAL EXAMPLES.....

*Click below to see our marketing samples for similar positions. To see all of our brochures, visit: wbcpinc.com/closed-jobs-private/ and use the password: #wbcp202212**

- [City Manager, City of Port Hueneme, CA](#)
- [City Manager, City of Sonoma, CA](#)
- [City Manager, City of Dunsmuir, CA](#)
- [City Manager, City of Pasadena, CA](#)
- [City Manager, City of Petaluma, CA](#)

C.

XI. COST PROPOSAL.....

WBCP will not limit the number of hours we work on a recruitment, rather we charge a flat rate and will spend the time necessary to ensure we are successful. Consulting fees will be billed in thirds at the beginning (open for applications and advertising campaign launched), middle (shortlist selection), and end of the recruitment process (selection made and background/ references concluded).

SERVICE COST PER RECRUITMENT

CITY MANAGER

Description of Services/Deliverables:	Inclusive Rate per Recruitment:
<u>Consulting Services:</u> Phases I-IV in the proposal's scope of work	\$28,900 (flat rate)
<u>Expenses:</u> Includes travel to client location (up to 2 trips), or document shipping fees/delivery charges to facilitate virtual meetings, advertising (may include print and postage), brochure design (flat fee of \$950.00 for graphic design), panel packet content, delivery charges, fees for background and reference checks, may include fee for one additional consultant to travel (and related expenses) and facilitate an additional panel for one day.	Up to \$7,900 (direct expenses not-to-exceed)

Out of Scope of Work: To provide the best results for our clients, we strongly recommend a steadfast commitment to agreed upon dates/times for critical recruitment milestones (shortlist meeting and interview dates). Any change of date/time initiated by the Client after they have been solidified may result in a forfeiture of our recruitment guarantee, as delays in the process may cause candidates to drop out and increase the likelihood of a "no selection" outcome. Additionally, any subsequent work for WBCP that arises out of such changes is considered out of scope work and may result in these hours being billed to our client at an hourly rate in addition to the consulting services fee.

ADDITIONAL BACKGROUND SERVICES AVAILABLE – *these services can be added to the package if desired*

Onsite Investigative Background Services: In addition to the background reports, education verification, credit report, and reference checks, which are included in the expenses above, WBCP also offers onsite investigative background services. If the client wishes to conduct a background check that includes an onsite visit by a trained private investigator and former Police Chief (similar to a police background check) please contact our office for an estimate for these services.

Force Majeure: *Client agrees that WBCP, Inc. is not responsible for any events or circumstances beyond its control (e.g., including but not limited to war, riots, embargoes, strikes, and/or Acts of God) that prevent WBCP, from meeting its obligations under this Agreement.*

C.

XII. OTHER.....**INSURANCE**

WBCP and its sub-consultants have reviewed the contractual agreement and the Insurance Requirements. If selected, WBCP will execute said agreement and will provide the required insurance documents. WBCP will submit certificates of insurance as evidence of the required coverage limits. Insurance policies include: liability, errors and omissions, workers compensation, and vehicle insurance.

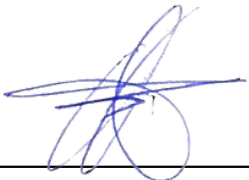
CONFIDENTIALITY SAFEGUARDS

Confidentiality is paramount in the work we do. We ensure that the client and candidate information we receive, and conversations with our client (and certainly discussions in closed session) are kept confidential. There are several physical safeguards we have in place including: locked and alarmed office space, password, and encryption protected information on our computers and servers, multiple backup systems.

As information is shared with our client, we discuss the importance of confidentiality and why it is important to the candidates they are considering but also brands the organization appropriately. We also ask candidates who are interviewed to keep candidate information confidential, as they may see or meet a candidate during the process. We emphasize that confidentiality is not just until the recruitment is completed, and a candidate is hired, confidentiality is in perpetuity. Leaked information is not a reputation that a client wants to receive, as this could deter future applicants from applying.

ORGANIZATIONAL DIVERSITY STATEMENT

WBCP embraces cross-cultural diversity and we are committed to equitable treatment and elimination of discrimination in all its forms at all organizational levels and throughout all consulting practices, including search services. We strive to reach diverse groups of people to inform them of leadership opportunities. **Upon our 2022 year-end review, we found that over the last three years, 69% of our applicants and 70% of our candidates placed in leadership positions with our clients came from diverse backgrounds.** We will make extensive efforts to attract a qualified applicant pool that represents a broad range of gender and ethnically diverse individuals.



 Wendi Brown, President

 JUNE 19, 2023

 Date

 Client, Title

 Date