**TO:** City Council

**FROM:** James L. App, City Manager

SUBJECT: Executive Search – Director of Administrative Services

**DATE:** March 20, 2007

FACTS:

**NEEDS:** For the City Council to consider authorizing a professional service contract for executive search services to identify a successor Director of Administrative Services.

1. Mike Compton, the Director of Administrative Services, has announced his intent to retire this year.

- 2. Recruitment to name a successor would benefit from a concentrated, statewide search.
- **3.** Two proposals for executive search services are provided for consideration:
  - William Avery & Associates, a California based management consulting firm who has a continuing relationship with the City of Paso Robles dating back to 1981, proposes to conduct the search over the next 4-6 months at a fee of \$15,900, and, expenses not-to-exceed an additional \$6,900. This firm successfully conducted the Director of Community Development search last year.
  - Bob Murray & Associates, a California based management consulting firm, has assisted the City with previous searches; most recently, the Director of Public Works. Murray & Associates proposes to conduct the search over the next 4-6 months at a fee of \$17,500, and, expenses not to exceed an additional \$7,900.

## ANALYSIS & CONCLUSION:

William Avery & Associates has assisted the City with labor relations since 1981. Mr. Avery's involvement has placed him in a position to gain a unique understanding of our community, organization and priorities. This was evidenced in his search of last year that resulted in the placement of the City's current Director of Community Development. His historical knowledge adds value to his assistance with the Director of Administrative Services search.

Bob Murray & Associates has assisted the City with other executive searches, most recently the Director of Public Works. Mr. Murray's firm is well known and respected for executive search having successfully assisted many California cities with key position recruitments.

Both firms are excellent executive recruiters. Inasmuch as Avery & Associates offers his services at a slightly lower fee, has abundant historical knowledge of City operations, and recently completed a very successful search for Paso Robles,

his proposal is presented for consideration.

**POLICY** 

REFERENCE: None.

**FISCAL** 

IMPACT: \$23,000 from General Emergency & Contingency Fund.

**OPTIONS:** A. Adopt Resolution Authorizing the City Manager to Appropriate \$23,000 for, and

Execute an Agreement with, William Avery & Associates to Undertake a Search

for a Director of Administrative Services.

B. Amend, Modify or Reject the Option Above.

Attachments: W. Avery & Associates Proposal

B. Murray & Associates Proposal

#### RESOLUTION NO.\_\_\_\_

#### AUTHORIZING THE CITY MANAGER TO APPROPRIATE \$23,000 & EXECUTE A CONTRACT WITH W. AVERY & ASSOCIATES FOR EXECUTIVE SEARCH SERVICES

WHEREAS, the Director of Administrative Services has indicated his intent to retire calendar year 2007; and									
WHEREAS, William Avery & Associates has proposed to assist the City in searching for a successor; and									
WHEREAS, William Avery & Associates has substantial executive search experience, expertise and knowledge of the City.									
NOW THEREFORE BE IT RESOLVED by the City Council of the City of El Paso de Robles that \$23,000 is appropriated from General Emergency & Contingency Fund to Account #110-130-5224-116, and the City Manager is authorized to execute a contract with, William Avery & Associates to conduct an executive search for Director of Administrative Services.									
PASSED AND ADOPTED by the City Council of the City of El Paso de Robles this 20th day of March 2007 by the following vote:									
AYES: NOES: ABSTAIN: ABSENT:									
Frank R. Mecham, Mayor									
ATTEST:									

Deborah Robinson, Deputy City Clerk



January 25, 2007

Marlaine Sanders City of Paso Robles 1000 Spring Street Paso Robles, CA 93446

Dear Marlaine:

Thank you for the opportunity to submit our proposal for the Director of Administrative Services for the City of Paso Robles. (Please don't tell me how long Mike has been with the City, as I was there when he was hired.)

We feel exceptionally suited to meet your needs in this assignment. Currently, we are engaged in a Finance Director recruitment for the City of Camarillo and a Financial Services Manager for Suisun City. During the past two years we have completed assignments for Administrative Services Director for the cities of Union City, Santa Rosa, Santa Clarita and Dublin along with numerous other Finance Director recruitments.

The enclosed proposal contains the following information:

- Company Profile and Firm Qualifications
- Recruitment Work Plan
- Consulting Fee, Billing Assignment and Guarantees & Ethics
- Recruitment Timeline
- Profiles on Principals of the Firm
- Partial Listing of Completed Recruitments

Thanks again. If you have any questions, please do not hesitate to call me at 408-399-4424.

Sincerely,

William H. Avery

WHA:jmc

William Avery & Associates, Inc. Labor Relations/Executive Search

3-1/2 N. Santa Cruz Ave., Suite A Los Gatos, CA 95030 408.399.4424 Fax: 408.399.4423 www.averya%GendaMem No. 12 - Page 4 of 34

## PROPOSAL FOR THE CITY OF PASO ROBLES RECRUITMENT FOR THE NEW DIRECTOR OF ADMINISTRATIVE SERVICES

#### Avery Associates - Profile

Avery Associates is a Los Gatos, California based Management Consulting firm incorporated in 1982. We specialize in Executive Search and Human Resources/Management Consulting. Our firm currently has two Principals and several key Consultants. Bill Avery heads the Firm and the Management/Labor Relations practice in addition to participating in key searches. Paul Kimura is the Principal who oversees the Search and Recruitment practice. Ann Slate, Cris Piasecki and Gary Rogers form the core recruitment team for the firm. Jackie Collins, Canela Bermea and Leah Jakusovszky handle administrative support. Anne Matteini oversees contracts and finance.

We offer a unique recruitment service as the background and capabilities of our firm Consultants gives us the ability to provide recruitment services that positively differentiates us from other strictly public sector search firms. We do so by incorporating private sector search methodologies into our public sector recruitment process, and combining "best" practices from each of the sectors in which we operate.

#### Firm Qualifications

A significant portion of the recruitment activity is directly handled by our firm's Principals. This hands-on involvement includes client interface, development of position specification, candidate interviewing and assessment, candidate presentation and final interview facilitation.

Mr. Avery, having served in the past as a City Manager, provides the 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 advanced technology experience, provides the basis for many of the recruitment strategies and tactics utilized by the firm. Collectively, the firms Principals offer exceptional expertise in this area of public sector recruitment.

#### Recruitment Team for the City of Paso Robles

Bill Avery will serve as the Principal in charge of this project and will be assisted by Ann Slate. Mr. Avery will be personally involved in the client meeting, development of position specification, outreach strategy, interview and assessment of candidates, presentation of candidates and participation in the final interview process with the, and will be available throughout the search process to provide other related consulting services.



#### Recruitment Plan and Services Provided

#### I. <u>Position Profile and Organizational Assessment</u>

The initial assessment phase is a critical component of the search process. Mr. Avery will meet with the key decision makers to discuss the organizational needs and position requirements. Our goal for this aspect of the recruitment process is to:

- Understand the City and organizational priorities for this position.
- Develop a clear understanding and consensus on the expertise, experience, education, performance attributes, interpersonal skills 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.

We would welcome the opportunity to have other discussions with various key staff members and/or other individuals if desired by the City. Based on these discussions, a candidate profile and a proposed job announcement brochure will be presented for approval. The ideal candidate profile would be incorporated into the formal position announcement. The candidate profile is also utilized in various other means as a marketing tool, an advertising copy, and for other announcements.

#### II. <u>Development of the Search Strategy</u>

The search strategy is developed in conjunction with the organizational assessment. The final approach is based on your input and considerations during the assessment activity. For this assignment, we feel it is critical to develop a high level of visibility with a comprehensive outreach program supplemented by a focused targeted recruitment approach. We would incorporate the following elements into this search:

- Original research, which consists of identification and contact of incumbents who meet the profile, and would be a possible source of candidates.
- Development of a targeted candidate list to be contacted by phone or e-mail, based on contacts, referrals and recommendations from key sources and other current and former Finance personnel who have extensive contacts and networks in this area.
- Active referral solicitation from various industry sources and other contacts developed from our many years of public sector consulting.

- Public information sources that include various membership listings such as the League of California Cities, and California Society of Municipal Finance Officers (CSMFO).
- An extensive, personalized mailing campaign to individuals identified through the means identified above and/or those affiliated with Finance throughout the state and country.
- Marketing and listing the position with various agencies, counties and cities within the state.
- Advertising in WESTERN CITY Magazine, JOBS AVAILABLE Magazine, and other publications or periodicals deemed appropriate for this search.
- Internet job postings on municipal finance organization websites.
- Utilization of our extensive key executive contacts included in our recruitment database.
- Development and distribution of the comprehensive position announcement to various city, county, and state departments, as well as agencies throughout the state and country.

#### III. Candidate Assessment

Initially, all candidates responding to this position will be evaluated based on their resume and, if appropriate, an extensive phone "screening" by a firm Principal. Candidates who pass this initial "qualifying" criteria are then scheduled for a formal interview with one of our firm's Principals.

These extended personal interviews typically take one hour and consists of a thorough discussion of the candidate's experience, accomplishments, management philosophy and interpersonal style. Those individuals who best fit the position requirements will have an extensive Candidate Assessment Report developed by the Principal who conducted the interview. Additionally, two initial reference interviews are performed on these candidates.

#### IV. Candidate Presentation

Upon completion of formal interviews and initial reference interviews, a selection of candidates for presentation is made. Typically, the number of final candidates requested by our clients range from three to seven.

We feel our extensive screening, interview, and reference process; combined with the knowledge gained during our initial assessment period, enable our client to proceed with fewer rather than more finalists.



The final candidates are presented in our candidate presentation "book." Each finalist will have a file consisting of a candidate summary sheet, a resume, the Candidate Assessment Report (based on the formal interview), and candidate reference interviews.

Candidate summary sheets for everyone who submitted a resume will also be included. This provides the client with insight to the 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.

Upon request, our firm will also arrange a summary background evaluation on the City's final one or two candidates. A copy of these confidential reports can be provided for you. The costs for these evaluations are considered independent of the recruitment expenses listed below and will be invoiced separately.

#### VI. <u>Position Closure and Follow-Up</u>

Based on the firm's experience in human resource management and executive search, we are able to assist our clients in the formulation of 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 after the Authority has hired the individual, we will speak with that individual to ensure that an effective transition has occurred. During the same period, we will also review the individual's status with your office.

#### Consulting Fee

Based on the services described in our proposal, the professional services consulting fee for this recruitment will be \$15,900. We would provide our first consulting invoice in the amount of \$6,900 at the outset of the search. The final invoice of \$9,000 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 \$6,900. These expenses include: advertising, clerical time, supplies, printing, telephone, postage,

and consultant travel for client discussions, meetings, local and out-of-area candidate interviews. All expense items will be detailed and billed on a monthly basis.

The consulting fee will be inclusive of all services defined within this proposal unless otherwise stated. If we are asked to conduct multiple searches simultaneously, the economies of scale allow us to discount both the Professional Services Fee and the not-to-exceed expense budget.

#### 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.

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 reasons which would have precluded his/her employment had they been known at the time employment started. In either case, we invoice a client only for out-of-pocket expenses incurred in identifying a replacement.



CITY OF PASO ROBLES

DIRECTOR OF ADMINISTRATIVE SERVICES—RECRUITMENT SCHEDULE	Description (Weeks)         1 2 3         4 5 6 7         8 9 10         11 12 13         14 15 16	Initial meeting(s)	- Job announcement draft 3	- Advertising and marketing in 3 - 4 place.	- Recruitment strategy finalized 3 - 4	- Approve and print job announcements 4 - 5	Recruitment period	- Candidate screening 6 - 10	Candidate Interviews	- Complete references 13	- Preparation of candidate book 13	Presentation of candidates	Final interviews	
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## 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 both private and public sector professional searches. He has been both a corporate recruitment director and HR director for a number of 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 is able to 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."

## Avery Recruitments

he following represents a partial list of Key Public Sector and Non-Profit Executive Recruitments completed by the Principals of Avery Associates:

City Manager Atherton Avalon Belmont Chowchilla Colma Culver City Gonzales Hanford Los Altos Hills Los Gatos Pismo Beach Pittsburg Redding Reedley Sanger San Marino Suisun City Vallejo

Asst/Dpty City Manager

Bakersfield Boulder, CO Camarillo Dublin Fremont

Huntington Beach

Lodi Los Gatos Moreno Valley Riverside San Leandro Thousand Oaks Vacaville

CEO/Executive Director

City of San Jose – Redevelopment

Agency

Community Redevelopment Agency

 City of Los Angeles Monterey County Resource Management Agency First 5 Monterey County Fresno Housing Authority **EOC of SLO County** 

Joint Venture - Civic Action Network Joint Venture – Silicon Valley San Luis Obispo Housing Authority

Santa Barbara - CAC

Support Network for Battered Women

City Attorney Bakersfield Inglewood Livermore San Luis Obispo Union City Vallejo

Parks/Recreation Director

Belmont Boulder, CO Corona Culver City Encinitas Gilrov Los Gatos Santa Clarita Westminster

HR Director Fremont Lancaster

Los Angeles County

Los Gatos Newport Beach Riverside

San Bernadino County San Leandro

San Luis Obispo Santa Clarita Santa Cruz Sonoma County

Santa Clara Valley Transit

Authority

Finance/Admin Services Director

Dublin Encinitas Fort Bragg Los Gatos Monterey County Oceanside Oxnard Palmdale Santa Clara Santa Clarita Santa Cruz Santa Rosa Union City

Public Works Director/Manager

Bishop Clovis Culver City Encinitas Los Gatos Monterey County Moreno Valley Olympia, WA Palmdale Paso Robles Pomona San Luis Obispo Santa Clarita Santa Rosa

Union City

Community Development/

Planning Director Beverly Hills Culver City Dublin Encinitas Gilroy Morgan Hill Oakland - Housing Paso Robles San Leandro San Ramon Saratoga Vacaville Woodland

Director of IT Boulder, CO Huntington Beach Modesto

Monterey County Sonoma County

Fire Chief Culver City Fairfield Fresno Gilroy

Moraga/Orinda Redwood City San Luis Obispo

Visalia

Police Chief Arroyo Grande Beverly Hills Culver City Gilrov Los Gatos Napa Pleasant Hill Pomona San Luis Obispo Santa Rosa Union City Vallejo Visalia

<u>Other</u>

Woodland

Alameda – Risk Manager Fremont -- City Clerk Glendale – Library Director Los Gatos - Library Director Pasadena – Chief Prosecutor San Mateo – Library Director Monterey County – Director

of Human Services

Agenda Item No. 12 - Page 13 of 34



# A PROPOSAL TO CONDUCT AN EXECUTIVE RECRUITMENT FOR A Director of Administrative Services

ON BEHALF OF THE

City of El Paso de Robles

1677 Eureka Road, Suite 202 Sacramento, CA 95661 (916) 784-9080 (916) 784-1985 fax January 24, 2007

Mr. Jim App, City Manager and Ms. Marlaine Sanders, Human Resources Manager City of El Paso de Robles 1000 Spring Street Paso Robles, CA 93446

Dear Mr. App and Ms. Sanders:

Thank you for inviting Bob Murray & Associates to submit a proposal to conduct the Director of Administrative Services recruitment for the City of El Paso de Robles. The following proposal details our qualifications and describes our process of identifying, recruiting and screening outstanding candidates on your behalf. It also includes a proposed budget, timeline and sample recruitment brochure.

At Bob Murray and Associates, we pride ourselves on providing quality search to local governments. Through many years of experience, we have created an ideal recruitment process by combining our ability to help you to determine the direction of the search and the types of candidates you seek with our experience recruiting candidates who are not necessarily looking for a job and are doing well in their current position. Working with professionalism, integrity and personal attention, our team-oriented search process, in addition to our proven expertise, ensures that the candidates we present for your consideration will match the criteria you have established and will be outstanding in their field.

With respect to the Director of Administrative Services recruitment, Bob Murray and Associates offers the following expertise:

- Bob Murray and Associates has an exceptional record of conducting recruitments for local government executives. In his 25 plus years of experience, Mr. Murray has conducted over 600 searches on behalf of local governments in the western United States. We have extensive experience working with counties, municipalities, special districts, and other organizations in the western half of the United States conducting recruitments for administration, building, development, engineering, human resources, legal, library, finance, fire, parks and recreation, planning, police, public affairs, public works, redevelopment, technology and transportation professionals to name a few. Our knowledge of what makes a candidate truly outstanding, along with our ability to assess the candidates' administrative skills, management style, leadership ability, communication skills and experience working with diverse and competing interests will ensure that the City of El Paso de Robles has an outstanding group of finalists from which to select the new Director of Administrative Services.
- ★ We have a national reputation for conducting quality searches that result in the placement of candidates ideally suited to our clients' needs. We have conducted hundreds of searches for municipal and special district executives within the field

of administrative services. Our recent experience includes conducting searches on behalf of the Cities of Garden Grove, Los Alamitos, Pleasanton, Stockton, and Ontario (Administrative Officer) in addition to the Town of Yucca Valley and the Placer County Water Agency (Deputy Director). Our extensive contacts and knowledge of outstanding candidates will ensure you have a quality group of finalists from which to select the City of El Paso de Robles' next Director of Administrative Services.

- In addition, our experience conducting recruitments for professionals within the field of finance will be a valuable asset when conducting the Director of Administrative Services recruitment. Currently, we are conducting the Finance Director recruitments on behalf of the California cities of Elk Grove and Ione; the Deputy Director of Water Financial Services recruitment for the City of Aurora, CO; and the Director of Finance and Administration recruitment for the Alameda County Congestion Management Agency. Most recently, we completed the Director of Finance recruitments for the California cities of Chino Hills, Half Moon Bay, Hercules, Imperial Beach, Lancaster, Pleasanton, San Leandro, Santa Monica, and Sparks, NV; the Business Services Manager recruitment for the Menlo Park Fire Protection District; the Program Manager III of Business Services for the City of Stockton Municipal Utilities Department; the Finance and Services Manager recruitment for the Palmdale Water District; the Chief Financial Officer recruitment for the Housing Authority for the City of Los Angeles; the Comptroller recruitment for Clark County, Nevada, and the Deputy Director of Finance recruitment for San Jose. Mr. Murray's past clients have included the cities of Baldwin Park, Brea, Campbell, Chino, Chula Vista, Fremont, Garden Grove, Long Beach, Madera, Modesto, Santa Clarita, and the City and County of San Francisco.
- Bob Murray and Associates' experience designing and conducting successful recruitment processes on behalf of cities, counties and special districts is unmatched in the field. Our process is specifically designed to meet your needs. We have developed and carried out numerous recruitment processes involving a wide variety of interests both inside and outside the organization. Should the City so desire, we can develop a process that provides a forum for the participation of members of the City Council, Department Heads, staff and representatives of the community, as appropriate, in both the development of the candidate profile, as well as the selection process. Our expertise includes designing interview strategies that involve these groups in the process, while ensuring that the City Manager is able to make the final selection. In addition, we can facilitate the discussion among these groups that leads to a consensus concerning the ideal candidate. Our knowledge of how to develop an effective process that is suited specifically to the needs of the City is unsurpassed.

A significant portion of our process focuses on conducting thorough and confidential background investigations of the top 2-3 candidates to ensure that nothing about them is left undiscovered. We have candid discussions with references who have insight into the candidate's experience, style and ethics; conduct a search of newspaper articles; and run credit, criminal and civil records reports. This ensures that the chosen candidate will not only be an excellent fit with the City of El Paso de Robles, but also that he/she will reflect positively upon your organization.

To learn first hand of the quality of our service and our recruitment successes, we invite you to contact the references listed on page 10 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 should you have any questions.

Sincerely,

So Murray and Associates

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#### THE RECRUITMENT PROCESS

Bob Murray and Associates' unique and client oriented approach to executive search will ensure that the City of El Paso de Robles has quality candidates from which to select the new Director of Administrative Services. Outlined below are the key steps in our recruitment process.

#### STEP 1 DEVELOPING THE CANDIDATE PROFILE

Our understanding of the City of El Paso de Robles's needs will be key to a successful search. We will work with the City Manager to learn as much as possible about the organization's expectations for a new Director of Administrative Services. We want to learn the values and culture of the organization, as well as understand the current issues, challenges and opportunities that face the City of El Paso de Robles. We also want to know the City Manager's expectations regarding the knowledge, skills and abilities sought in the ideal candidate and will work with the City to identify expectations regarding education and experience. Additionally, we want to discuss expectations regarding compensation and other items necessary to complete the successful appointment of the ideal candidate. The profile we develop together at this stage will drive subsequent recruitment efforts.

#### STEP 2 ADVERTISING CAMPAIGN AND RECRUITMENT BROCHURE

After gaining an understanding of the City of El Paso de Robles's needs, we will design an effective advertising campaign appropriate for the Director of Administrative Services recruitment. We will focus on professional journals that are specifically suited to the Director of Administrative Services search. We will also develop a professional recruitment brochure on the City Manager's behalf that will discuss the community, organization, position and compensation in detail. Once completed, we will mail the profile to an extensive audience, making them aware of the exciting opportunity with the City of El Paso de Robles.

#### STEP 3 RECRUITING CANDIDATES

After cross-referencing the profile of the ideal candidate with our database and contacts in the field, we will conduct an aggressive outreach effort, including making personal calls to prospective applicants, designed to identify and recruit outstanding candidates. We recognize that the best candidate is often not looking for a new job and this is the person we actively seek to convince to become a candidate. Aggressively marketing the Director of Administrative Services position to prospective candidates will be essential to the success of the search.

#### STEP 4 SCREENING CANDIDATES

Following the closing date for the recruitment, we will screen the resumes we have received. We will use the criteria established in our initial meetings as a basis upon which to narrow the field of candidates.

#### STEP 5 PERSONAL INTERVIEWS

We will conduct personal interviews with the top 10 to 12 candidates with the goal of determining which candidates have the greatest potential to succeed in your organization. During the interviews we will explore each candidate's background and experience as it relates to the Director of Administrative Services position. In addition, we will discuss the candidate's motivation for applying for the position and make an assessment of 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 PUBLIC RECORD SEARCH

Following the interviews, we will conduct a review of published articles for each candidate. Various sources will be consulted including Lexis-Nexis<sup>TM</sup>, a newspaper/magazine search engine, Google, and local papers for the community's in which the candidates have worked. This alerts us to any further detailed inquiries we may need to make at this time.

#### STEP 7 RECOMMENDATION

Based on the information gathered through meetings with your organization, personal interviews with candidates and reference checks, we will recommend a limited number of candidates for your further consideration. We will prepare a detailed written report on each candidate that focuses on the results of our interviews and public record searches. We will make specific recommendations, but the final determination of those to be considered will be up to you.

#### STEP 8 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 adopt an approach that fits your needs, whether it is a traditional interview, multiple interview panel or assessment center process. We will provide you with suggested interview questions and rating forms and will be present at the interview/assessment center to facilitate the process. Our expertise lies in facilitating the discussion that can bring about a consensus regarding the final candidates.

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 manner in which the entire process is conducted will have an effect on the candidates' perception of your organization.

#### STEP 9 BACKGROUND CHECKS / DETAILED REFERENCE CHECKS

Based on final interviews we will conduct credit, criminal, civil litigation and motor vehicle record checks for the top one to three candidates. In addition, those candidates will be the subjects of detailed, confidential reference checks. In order 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. We will ask candidates to forward the names of their supervisors, subordinates and peers for the past several years. Additionally, we make a point of speaking confidentially to individuals who we know have insight into a candidate's abilities, but who may not be on his/her preferred list of contacts. At this stage in the recruitment we will also verify candidates' degrees.

#### **STEP 10 NEGOTIATIONS**

We recognize the critical importance of successful negotiations and can serve as your representative during this process. We know what other organizations have done to put deals together with great candidates and will be available to advise you regarding current approaches to difficult issues such as housing and relocation. We will represent your interests and advise you regarding salary, benefits and employment agreements with the goal of putting together a deal that results in the appointment of your chosen candidate. Most often we can turn a very difficult aspect of the recruitment into one that is viewed positively by both you and the candidate.

#### STEP 11 COMPLETE ADMINISTRATIVE ASSISTANCE

Throughout the recruitment we will provide the City Manager with updates on the status of the search. We will also take care of all administrative details on your behalf. Candidates will receive personal letters advising them of their status at each critical point in the recruitment. In addition, we will respond to inquiries about the status of their candidacy within twenty-four hours. Every administrative detail will receive our attention. Often, candidates judge our clients based on how well these details are handled.

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#### **BUDGET AND TIMING**

#### PROFESSIONAL FEE AND EXPENSES

The consulting fee for conducting the Director of Administrative Services recruitment on behalf of the City of El Paso de Robles is \$17,500 plus expenses. Services provided for the fee consist of all steps outlined in this proposal including three (3) days of meetings on site. The City of El Paso de Robles will be responsible for reimbursing expenses Bob Murray and Associates incurs on your behalf. We estimate expenses for this project to be \$7,900. Reimbursable expenses include such items as the cost of travel, clerical support, placement of ads, credit, criminal and civil checks, education verification, as well as newspaper searches. In addition, postage, printing, photocopying, and telephone charges will be allocated.

#### TIMING

We are prepared to start work on this assignment immediately and anticipate that we will be prepared to make our recommendation regarding finalists within seventy five to ninety days from the start of the search.

#### PROFESSIONAL QUALIFICATIONS

#### BOB MURRAY, PRESIDENT

Mr. Murray brings over 25 years experience as a recruiter. Mr. Murray is recognized as one of the nation's leading recruiters. He has conducted hundreds of searches for cities, counties, and special districts. He has been called on to conduct searches for some of the largest most complex organizations in the country and some of the smallest. Mr. Murray has conducted searches for chief executives, department heads, professional and technical positions. Mr. Murray has taken the lead on the firm's most difficult assignments with great success. His clients have retained him again and again given the quality of his work and success in finding candidates for difficult to fill positions.

Prior to creating Bob Murray & Associates, Mr. Murray directed the search practice for the largest search practice serving local government in the country. Mr. Murray has worked in local government and benefits from the knowledge of having led an organization. Prior to his career in executive search he served as the City Manager for the City of Olympia, Washington. He has also served as an Assistant City Manager and held positions in law enforcement.

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

#### REGAN WILLIAMS, VICE PRESIDENT

Mr. Williams brings 30 years of local government experience to Bob Murray and Associates. Most recently, he worked as a private consultant with Deloitte and Touche on various public sector assignments. Prior to that, he served as Director of Public Safety with the City of Sunnyvale, CA.

Mr. Williams was involved in the development of some of Sunnyvale's most innovative programs and has a national reputation for excellence in law enforcement. He has been responsible for numerous recruitments throughout his career. Clients find his insight and expertise in recruitment and selection a valuable asset.

Mr. Williams received his Bachelor's degree in Administration of Justice from San Jose State University. He is also a graduate of the FBI National Academy.

#### JIM ANTONEN, SENIOR MANAGER

Mr. Antonen brings 29 years of local government experience to Bob Murray and Associates, twenty-seven of those as a City Manager. Most recently he served as City Manager in the City of Davis, CA.

Mr. Antonen has been involved in city management for the past twenty seven years both in Minnesota and South Dakota. He served on the League of Minnesota Cities Insurance Trust Board for nine years, three of which he was Chair. Mr. Antonen also served as President of the Minnesota City County Management Association. He brings a background of working for both the State and Federal government.

Mr. Antonen has a Masters in Public Administration from the University of South Dakota and a Bachelor's of Science Degree in History and Political Science from Dakota State College. He also did graduate work at the American University in Washington, D.C. Mr. Antonen is an ICMA Credentialed Manager and a past Board Member of Cal-ICMA.

#### JENNIFER NITRIO-SALEEM, MANAGER

Ms. Nitrio-Saleem's diverse background includes extensive expertise working with counties, municipalities, special districts, and other organizations in the western half of the United States conducting recruitments for development, engineering, human resources, library, finance, fire, parks and recreation, planning, public works, redevelopment, technology and transportation professionals to name a few.

Ms. Nitrio-Saleem is know for her personal approach to executive search as she works closely with clients and candidates alike to ensure a successful search. Clients and candidates express again and again that it is always a positive and refreshing experience to work with Ms. Nitrio-Saleem.

Ms. Nitrio-Saleem is very active in the community and serves on the Board of Directors with two local non-profit organizations. Her contributions include forming partnerships with the business community, extensive grant writing, chairing large fundraising efforts, recruiting volunteers and writing articles and reports for the organizations.

Ms. Nitrio-Saleem received her Bachelor's of Arts Degree in Ethnic Studies, summa cum laude, from California State University, Sacramento. She is a life member of the Phi Kappa Phi Honor Society and the Golden Key Honor Society.

#### GRETA LAWSON, PRINCIPAL CONSULTANT

Ms. Lawson actively contributes to Bob Murray and Associates' goal of providing exceptional customer service through close coordination with our clients. She conducts research, recruits candidates, and performs detailed background verifications, including reference checks, on candidates. She also serves as a liaison between candidates and clients in order to ensure an outstanding recruitment process that results in the selection of the clients' chosen candidate(s).

Ms. Lawson is uniquely qualified to assist clients in all aspects of executive recruitment. With several years of industry experience, Ms. Lawson is noted for her customer service skills and follow through with clients and candidates alike.

Ms. Lawson received her Bachelor's of Art Degree in English from California State University, Sacramento and is a life member of the Golden Key Honor Society.

#### RENEE NARLOCH, SENIOR CONSULTANT

Renee Narloch has extensive experience in public sector recruitments nationwide. She was formerly employed by MAXIMUS as a senior consultant with sole responsibility for executive search efforts in the Southeastern United States. She also worked in the Cost Allocation division providing governmental cost accounting and data management services to the public sector, including Alachua County, Florida.

Ms. Narloch has ten years of experience in Executive Recruitment and has been involved in over 100 national searches. Prior to her recruitment career, she worked for three Fortune 500 companies in their sales, marketing and financial accounting divisions. Ms. Narloch has been responsible for all facets of recruitment including project management, recruiting candidates, conducting preliminary interviews and detailed reference inquires; and assisting clients in final interviews and negotiations. Residing in Florida, Ms. Narloch currently assists Bob Murray & Associates on an as needed basis with recruitments in the mid-west and east coast as well as with outreach efforts on the west coast.

Ms. Narloch received her Bachelors of Arts degree in Information Studies, summa cum laude, at Florida State University.

#### AMANDA SANDERS, CONSULTANT

As a consultant with Bob Murray & Associates, Ms. Sanders is responsible for research, candidate recruitment and screening, as well as reference checks and background verifications. She focuses on client communication and works closely with clients to coordinate candidate outreach and ensure a successful search.

Ms. Sanders brings several years of industry experience as she worked for one of the nation's largest recruitment forms. Her insight into the recruitment process is a valuable asset to Bob Murray & Associates.

Ms. Sanders received her Bachelor's of Arts degree in Communications from the University of Wyoming.

#### REFERENCES

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

CLIENT: City of Pleasanton

POSITION: Administrative Services Director, City Manager, Deputy City Manager, Finance

Director, Planning Director, Police Chief, Police Captains, and Principal

Planner

REFERENCE: Mr. Nelson Fialho, City Manager, (925) 931-5048

CLIENT: City of Stockton

POSITION: Administrative Services Director, City Attorney, City Manager, Community

Development Director, Deputy City Manager, Deputy Human Resources Director, Engineering Manager/Assistant Director of Municipal Utilities Department, Library Director, Redevelopment Director, and other various

Deputy Directors, Program Managers, and Senior Engineers

REFERENCE: Ms. Christine Tien, Deputy City Manager or Mr. Johnny Ford, Deputy City

Manager, (209) 937-8212

CLIENT: City of Los Alamitos

POSITION: Director of Administrative Services and City Manager

REFERENCE: Mr. Fred Freeman, Mayor, (562) 431-3538

CLIENT: City of Chino Hills

POSITION: Finance Director, City Clerk, City Engineer and Community Development

Director

REFERENCE: Mr. Doug LaBelle, City Manager, (909) 364-2611

CLIENT: City of Imperial Beach

**POSITION:** Finance Director

REFERENCE: Mr. Tom Ritter, Assistant City Manager, (619) 423-8615

## BOB MURRAY & ASSOCIATES CLIENT LIST SINCE 2000

CITY MANAGER

Albany, CA (City Administrator)

Albany, OR
Antioch, CA
Arcata, CA
Benicia, CA
Campbell, CA
Capitola, CA
Carmel, CA

Castle Rock, CO (Town Manager)

Chico, CA Chula Vista, CA Claremont, CA Coos Bay, OR Corcoran, CA Corona, CA

Corte Madera, CA (Town Manager)

Elk Grove, CA Eugene, OR Fortuna, CA Fremont, CA Goleta, CA

Grover Beach, CA Half Moon Bay, CA

Hollister, CA
Imperial, CA
Ione, CA
Irwindale, CA
La Mesa, CA
La Palma, CA
Lakeport, CA
Lancaster, CA
Lathrop, CA
Lemon Grove, CA

Lemon Grove, CA Los Alamitos, CA Mill Valley, CA

Milwaukie, OR Monrovia, CA Newberg, OR Newcastle, WA Novato, CA Oakdale, CA

Oakley, CA Oceanside, CA Ojai, CA Orinda, CA Pacifica, CA

Pico Rivera, CA

Pismo Beach, CA Pittsburg, CA Pleasanton, CA Poway, CA

Rancho Cordova, CA

Rancho Santa Margarita, CA

Red Bluff, CA
Rio Vista, CA
Roseville, CA
Salem, OR
San Antonio, TX
San Clemente, CA
San Ramon, CA
Shoreline, WA

South Lake Tahoe, CA

Springfield, OR Stanton, CA Stockton, CA Thousand Oaks, CA

Tracy, CA

Truckee, CA (Town Manager)

Turlock, CA Ventura, CA Walnut Creek, CA Westminster, CA Yuba City, CA

#### ASSISTANT/DEPUTY CITY

MANAGER Alameda, CA Carlsbad, CA Lancaster, CA Monterey, CA

North Las Vegas, NV

Orange, CA Pasadena, CA Petaluma, CA Pleasanton, CA Pomona, CA

Rancho Cordova, CA

Reno, NV Rocklin, CA Stockton, CA Yuba City, CA

#### COUNTY ADMINISTRATOR

Clackamas County, OR
Clark County, NV (Assistant)
Deschutes County, OR
Marion County, OR
Tehama County, CA
Washington County, OR

## ADMINISTRATIVE SERVICES DIRECTOR

Garden Grove, CA
Los Alamitos, CA
Ontario, CA
Placer County Water Agency, CA
Pleasanton, CA
Stockton, CA
Yucca Valley, CA

#### ANIMAL SERVICES DIRECTOR

Oakland, CA Rancho Cucamonga, CA

#### AVIATION/AIRPORT

Big Bear Airport, CA Dallas/Forth Worth, TX San Diego Regional Airport Authority, CA San Jose, CA

#### BUILDING

#### OFFICIALS/INSPECTION

Bakersfield, CA Marin County, CA Modesto, CA Palo Alto, CA Sacramento, CA San Francisco, CA Stockton, CA Yuba City, CA

#### CITY CLERK

Central Contra Costa Sanitation District, CA Chino Hills, CA Fremont, CA Napa, CA Rio Vista, CA

#### COMMUNITY DEVELOPMENT

DIRECTOR Benicia, CA Capitola, CA Chino Hills, CA Fullerton, CA Los Banos, CA Maple Valley, WA Modesto, CA Newark, CA Newcastle, WA Salem, OR San Carlos, CA Santa Cruz, CA Stockton, CA Vallejo, CA Walnut Creek, CA

Yucca Valley, CA

## CONVENTION AND VISITOR'S BUREAU DIRECTOR

Los Angeles, CA North Lake Tahoe Visitors Bureau, CA Mammoth Lakes, CA San Antonio, TX Steamboat Springs, CO

## ECONOMIC DEVELOPMENT/ REDEVELOPMENT/ HOUSING DIRECTOR

Fremont, CA
Fullerton, CA
Fullerton, CA
Milpitas, CA
Port of San Diego, CA
Sacramento, CA
Stockton, CA
Upland, CA
Vancouver Housing Authority, WA
(Executive Director & Deputy
Executive Director)

#### **ENGINEERING**

Bakersfield, CA Central Contra Costa Sanitary District, CA Clark County, NV – McCarren Airport Damascus, OR

Dublin San Ramon Services District,

CA

Nevada County, NV Nye County, NV

Oceanside, CA

Reclamation District 1000, CA

Reno, NV Stockton, CA

San Luis Obispo County, Nacimiento Project, CA

Tracy, CA

#### **EXECUTIVE DIRECTOR**

Arizona Municipal Water Users

Association, AZ

Bay Area Air Quality Management

District, CA

California State Association of

Counties, CA

Central Contra Costa Solid Waste

Authority, CA

Chula Vista Redevelopment Agency,

CA

Housing Authority of the City of

Los Angeles, CA

Kings Community Action

Organization, CA

Los Angeles Convention Center, CA

March Joint Powers Authority, CA

Metro, Portland, OR

Public Agency Risk Sharing

Authority Commission, CA

Sacramento Area Flood Control

Agency, CA

San Diego Association of

Governments, CA

San Joaquin Council of

Governments, CA

South Bayside Waste Management

Authority, CA

Vancouver Housing Authority, WA

(Deputy)

#### FINANCIAL

Alameda County Congestion

Management Agency, CA

Aurora, CO

Baldwin Park, CA

Boulder City, NV

Campbell, CA

Chino Hills, CA

Clark County, NV

Damascus, OR

Elk Grove, CA

Half Moon Bay, CA

Hercules, CA

Housing Authority of the City of

Los Angeles, CA

Imperial Beach, CA

Ione, CA

Los Angeles, CA

Lancaster, CA

Menlo Park Fire Protection District,

CA

Palmdale Water District, CA

Pleasanton, CA

San Francisco, CA

San Leandro, CA

San Jose, CA

Santa Monica, CA

Sparks, NV

#### FIRE CHIEF

Alameda, CA

Arroyo Grande (Director of

Building and Fire)

Aurora, CO

Chula Vista, CA

Culver City, CA

Eugene, OR

Fremont, CA

Fairfield, CA

Folsom, CA

Fullerton, CA

Half Moon Bay Fire Protection

District, CA

Hillsboro, OR

Grand Junction, CO

Livermore – Pleasanton Fire

District, CA

Milpitas, CA

Monrovia, CA

Mountain View, CA

Newark, CA

Oceanside, CA

Rancho Cucamonga, CA (Deputy and Chief) Rancho Santa Fe Fire Protection District. CA Salinas, CA San Mateo, CA San Miguel Fire Protection District, CA Santa Cruz, CA Sonoma Valley Fire & Rescue Authority, CA University of California, Davis Union City, CA Upland, CA Vacaville, CA

GENERAL MANAGER Calaveras County Water District, CA Central Contra Costa Sanitation Agency, CA Central Marin Sanitation Agency, CA Hilton, Famkopf, and Hobson LLC, CA Joshua Basin Water District, CA Monterey Regional Waste Management District, CA Monterey Regional Water Pollution Control Agency, CA (Assistant GM) Rainbow Municipal Water District, CA Reclamation District 1000, CA (District Engineer) Sanitary District No. 5 of Marin County, CA Sewer Authority Mid-Coastside, CA South Placer Municipal Utility District, CA Union Sanitary District, CA Valley of the Moon Water District, CA

#### **LEGAL COUNSEL**

Walnut Valley Water District, CA

Aurora, CO Hayward, CA Monterey, CA

Morgan Hill, CA North Las Vegas, NV Oceanside, CA Palo Alto, CA Salinas, CA San Mateo, CA Stockton, CA Ventura, CA Yolo County, CA

#### LIBRARY

Corona, CA Folsom, CA Palos Verdes Library District, CA Stockton-San Joaquin County Public Library, CA

#### PARKS/RECREATION/ **COMMUNITY SERVICES**

Anaheim, CA Arlington, TX Bakersfield, CA El Segundo, CA Emeryville, CA Half Moon Bay, CA Glendale, AZ Long Beach, CA Lynwood, CA (Director and Assistant Director) Maple Valley, WA Pleasanton, CA Pleasant Valley Recreation and Park District, CA Pomona, CA Sacramento, CA Salinas, CA San Jose, CA (Director and Assistant Director) Santa Clarita, CA Stockton, CA Ventura, CA Whittier, CA

#### PERSONNEL/HUMAN RESOURCES

Anaheim, CA Corona, CA Fresno, CA (Retirement Benefits Manager)

Inland Empire Utilities Agency, CA

Glendale, AZ

Judicial Council of California, CA

Newark, CA

North Las Vegas, NV

Ontario, CA

Palmdale Water District, CA

Pomona, CA Rocklin, CA Stockton, CA

Tehama County, CA

#### **PLANNING**

Alameda, CA
Damascus, OR
El Segundo, CA
Milpitas, CA
Modesto, CA
Oceanside, CA
Palo Alto, CA
Pasadena, CA
Reno, NV
Riverside, CA

Roseville, CA Sacramento, CA

Santa Cruz, CA

Tracy Unified School District, CA

#### POLICE CHIEF/SAFETY

Ashland, OR Aurora, CO Berkeley, CA Capitola, CA Carlsbad, CA Chico, CA Colton, CA Concord, CA Culver City, CA Eugene, OR Fairfield, CA

Glendale, AZ (Chief and Assistant

Chiefs)

Glendora, CA

Grand Junction, CO

Half Moon Bay, CA

Hayward, CA Irvine, CA Irwindale, CA La Mesa, CA Littleton, CO

Los Angeles, CA

Los Angeles World Airports, CA

Los Banos, CA
Menlo Park, CA
Merced, CA
Mesa, AZ
Monrovia, CA

Monterey, CA Novato, CA

Oakdale, CA

Oceanside, CA

Petaluma, CA Pleasanton, CA

Port of Long Beach, CA Port of San Diego, CA

Reno, NV Rio Vista, CA Rocklin, CA Sacramento, CA San Bernardino, CA

San Diego State University, CA

San Fernando, CA San Francisco, CA

San Jose State University, CA

San Rafael, CA Seaside, CA

Sunnyvale, CA (Public Safety

Director)
Tulsa, OK
Turlock, CA

University of California, Davis, CA University of California, Santa

Barbara, CA

University of Oregon, OR

Vacaville, CA Whittier, CA

#### POLICE LIEUTENANT/CAPTAIN

Pleasanton, CA Santa Rosa, CA Port of San Diego, CA University of California, San Francisco, CA

## PUBLIC SAFETY COMMUNICATIONS

Aurora, CO

Clackamas County, OR

Heartland Communications Facility

Authority, CA

San Francisco, CA

San Jose, CA

Washington County Consolidated

Communications Agency, CA

#### PUBLIC WORKS

Belmont, CA

Chandler, AZ

Clark County, NV

Dublin San Ramon Services District,

CA

Fresno, CA

Galt, CA

Half Moon Bay, CA

Inglewood, CA

Lathrop, CA

Los Banos, CA

Mammoth Lakes, CA

Maple Valley, CA

Morro Bay, CA

Pico Rivera, CA

Pomona, CA (Director and Deputy

Director)

San Carlos, CA

Santa Cruz, CA

Stockton, CA

Tehama County, CA

Tiburon, CA

Upland, CA

#### **TECHNOLOGY**

Clark County, NV

Fresno, CA

Hayward, CA

Hillsboro, OR

Inland Empire Utilities Agency, CA

Modesto, CA

San Francisco, CA

#### **TRANSPORTATION**

Santa Clara Valley Transportation

Authority, CA

Santa Clarita, CA

Washington County, OR

#### WASTE WATER/SANITATION/

SOLID WASTE

San Jose, CA

Stockton, CA

#### WATER

Aurora, CO

Bakersfield, CA

Stockton, CA

#### **OTHER**

Bureau Veritas, CA (Vice President

- Operations)

Central Marin Sanitation Agency,

CA (Director of Safety and

Training)

Hilton, Farmkopf, and Hobson LLC

(Manager/Vice President)

Port of Long Beach, CA (Managing

Director)

Port of San Diego, CA (Senior

Director of Real Estate)

Robson Homes (Forward Planner

and Land Acquisition Manager)

Sacramento, CA (Preservation

Director)

Sacramento, CA (Urban Design

Manager)

San Francisco, CA (311 Director)

San Francisco, CA (Director of

Office of Citizen Complaints)

San Jose, CA (Assistant Director of

Environmental Services)

San Manuel Band of Tribal Indians

(Tribal Manager)

Superior Court of San Luis Obispo

County, CA (Assistant Court

Executive Officer)