

**TO:** City Council  
**FROM:** James L. App, City Manager  
**SUBJECT:** Executive Search – Community Development Director  
**DATE:** May 20, 2014

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**Needs:** For the City Council to engage outside assistance to conduct a State-wide search for Director of Community Development.

**Facts:**

1. Ed Gallagher, Director of Community Development, plans to retire December 2014.
2. A State-wide search is indicated to attract experienced professionals well-versed in the disciplines/services offered by the Department.
3. There are a number of Executive Search firms that specialize in assisting local governments in the recruitment and selection of public executives.
4. The City received four proposals from qualified Executive Search firms.

**Analysis & Conclusion:**

Generally, professionals with the requisite sophistication of planning, engineering, and executive management skills and abilities are currently employed with other public agencies. Soliciting their interest is challenging and highly competitive.

Executive Search firms have established access to, and an accepted means for soliciting public executives. Additionally, these firms can assist in certain labor intensive and time-consuming elements of the search and selection process.

Proposals were sought and four were received (see attached proposal summary). All four firms are well known and accomplished search firms. Proposed fees (including expenses) range from an estimated \$19,400 to \$26,000.

Avery & Associates appears to have the most well suited proposal. The principal, Bill Avery, is well acquainted with Paso Robles' unique character and challenges as a result of a long professional affiliation. He assisted the City in the successful placement of Community Development Director Ron Whisenand and Police Chief Robert Burton.

It is important to note that the outcome of any search process cannot be guaranteed. Success is a function of market dynamics including competition, availability, marketability, timing, etc. What the City would be assured is market penetration, as well as professional recruitment and selection assistance.

**Policy**

**Reference:** Avery & Associates proposal dated April 22, 2014.

**Fiscal Impact:** Avery & Associates proposed cost for search services is \$13,900, plus not to exceed expense costs of \$5,500. The total estimated costs of \$19,400 would be drawn from General Fund Reserves (current balance of approximately \$7,400,000).

- Options:**
- a. Authorize the City Manager to Execute a Contract with Avery & Associates for Executive Search Services, and approve the Budget Adjustment Request to appropriate funds from General Fund Reserves in the amount of \$19,400.
  - b. Amend, modify, or reject the foregoing option.

**Attachments:**

1. Summary of Proposals Received
2. Avery & Associates Proposal – dated 4/22/14
3. Budget Adjustment Request

**Williams Avery & Associates**

Search Cost: \$13,900

Expenses: \$5,500 (not to exceed)

Guarantee: Replace at no charge during first year (resignation/termination)

Notes: Handled last two Director recruitments (Police Chief & Community Development)

**Bob Murray & Associates**

Search Cost: \$17,500

Expenses: \$6,500 - \$7,300

Guarantee: None noted

Notes: Worked with City in a past Public Works Director search

**Peckham & McKenney**

Search Cost: \$17,500

Expenses: \$7,000 (not to exceed)

Guarantee: Replace at no charge during first year (except budget cutbacks/position elimination)

Notes: Broad search experience

**Teri Black & Company**

Search Cost: \$17,500

Expenses: \$8,500 (not to exceed)

Guarantee: Discount of 25-50% of original fee within first year (any termination)

Notes: Performed multiple placements for SLO County local agencies



April 22, 2014

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

Dear Ms. Sanders,

We are pleased to submit our proposal for the recruitment of a new Community Development Director for the City of Paso Robles. We value our ongoing working relationship with the City and would look forward to supporting your needs in this assignment.

Our firm is well qualified to support you in this assignment based on our extensive public sector experience and relevant expertise in Community Development related recruitments. Currently, we are conducting an Assistant Community Development Director search for the City of Camarillo and we recently completed a Planning Director search for Calaveras County. Additionally, during the past 18 months, we completed Community Development Director recruitments for the cities of Santa Clarita, West Hollywood and Stockton. In the past several years we also completed the following assignments: CDD for the cities of Redwood City (2011), San Mateo (2009), Oakland (Deputy Director of Community Development/Housing, 2009) and the Town of Los Gatos (2009). And, of course, we conducted the search that brought Ron Whisenand to the City as Community Development Director in 2006 along with several other key City department head placements.

Following review of our proposal, it is our hope that our relationship with your City, our history of successful recruitments, our professionalism and positive results we have delivered for our clients will provide the basis for selection of our firm. Enclosed you will find the following information:

- Company Profile
- Firm Qualifications
- Recruitment Team
- Recruitment Plan
- Consulting Fee
- Guarantees & Ethics
- Recruitment Timeline

William Avery & Associates, Inc.  
Consultants to Management

3-1/2 N. Santa Cruz Ave., Suite A  
Los Gatos, CA 95030  
408.399.4424  
Fax: 408.399.4423  
www.averyassoc.net

Once again, thank you for the opportunity to submit our proposal to assist you with your 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 PASO ROBLES FOR THE RECRUITMENT OF COMMUNITY DEVELOPMENT DIRECTOR

## William Avery & Associates, Inc. – Our Profile

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 the firm. He oversees the Labor Relations practice and also leads key searches. Paul Kimura is the Principal who oversees the Executive Search and Recruitment practice. Key staff members include Ann Slate, who supports the search practice and the firm's administrative staff includes Anne Matteini, the Finance/Contracts Administrator, and Jackie Collins and Jessica Towner. 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. Collectively and combined, the firms Principals offer exceptional expertise in the area of public sector recruitment and consulting.

## Firm Qualifications – 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. 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 of 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 Paso Robles

Bill Avery will serve as the Project Lead in this assignment and will be supported by the administrative team of Avery Associates. 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 Plan and Services Provided

### I. Position Profile and Organizational Assessment

The initial assessment phase is a critical component of the search process. Mr. Avery will meet the City Manager and other city executives you deem appropriate to discuss the organizational needs and position requirements.

Our goal for this aspect of the recruitment process is 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.

### II. Development of the Search Strategy and Candidate Outreach

Our search strategy will be developed in conjunction with the organizational assessment. 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:

- \* Utilizing our database to contact and present the opportunity to current City/County Community Development/Planning personnel in comparable agencies. This effort will mainly be geared toward identifying individuals who meet the profile of the ideal candidate but are not actively seeking other employment.



- \* 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.
- \* Advertising in WESTERN CITY magazine (if timeline allows), JOBS AVAILABLE magazine and other publications or periodicals deemed appropriate for this search.
- Internet job postings on state or national public sector employment bulletin boards including APA, CALAPA, CALED, California RDA and other related websites, and our company website (www.averyassoc.net).
- 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

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 firm Consultant. Candidates who pass the initial “qualifying” criteria are then scheduled for a formal interview with the Principal in charge of the project. 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. The philosophy here is that the best indicator of future performance is assessing past behavior. This methodology allows the firm to “project” how a candidate would approach and address 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 and initial reference interviews, a selection of candidates for presentation is made. 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 initial candidate reference reports.

V. Selection Process

Once the final candidate interview group is identified, we will support the City with the final interview process as requested. Our firm will provide candidates with guidance related to travel planning, hotel accommodations, as well as other interview planning issues.

Our firm will also arrange for summary background evaluations (credit, civil and criminal records; education verifications; and DMV record) on the City’s final one or two candidates. A copy of these confidential reports can be provided for you. In addition, we will upon request, conduct final reference interviews for the final one or two candidates at no additional cost.

VI Recruitment Closure and Follow-Up

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 City 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 \$13,900. If awarded the search, we would request an initial retainer of \$4,900 at the outset of the search. A second invoice of \$4,500 would be submitted upon the Clients acceptance of a finalist candidate group. The final balance of \$4,500 would be invoiced upon acceptance of a job offer constituting completion of the search. Our invoicing models ensures the firm will remain totally committed to the City throughout the duration of the search as the final invoice is not submitted until the City has an accepted candidate. 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 be a not-to-exceed amount of \$5,500 without the express consent of the City. These expenses include: advertising, clerical time, supplies, printing, telephone, postage and consultant travel for client discussions, meetings and local or out-of-area candidate interviews. All expense items will be detailed and billed on a monthly basis.

## 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 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.



**CITY OF PASO ROBLES  
COMMUNITY DEVELOPMENT DIRECTOR – RECRUITMENT SCHEDULE**

Description (Weeks)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Initial meeting(s)	<u>1</u>																			
- Job announcement draft			<u>3</u>																	
- Advertising and marketing in Place.			<u>3 - 4</u>																	
- Recruitment strategy finalized			<u>3 - 4</u>																	
- Approve and print job announcement			<u>4 - 5</u>																	
Recruitment period								<u>4 - 10</u>												
- Candidate screening								<u>6 - 10</u>												
Candidate Interviews												<u>11 - 12</u>								
- Complete references													<u>13</u>							
- Preparation of candidate book													<u>13</u>							
Presentation of candidates														<u>14</u>						
Final interviews																<u>16</u>				

Approvals/workflow 1. Dept Head 2. Admin Svcs 3. City Manager 4. City Council	<b>City of Paso Robles</b> <b>BUDGET ADJUSTMENT REQUEST</b> Search for CD Director	Budget JE #  AGENDA DATE 5/20/2014
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DESCRIPTION	ORG #	OBJECT #	PROJECT #	AMOUNT
<b>FINANCING SOURCES</b>				
General Fund	100	99999	G0001	\$19,400
<b>TOTAL FINANCING SOURCES</b>				<b>\$19,400</b>
<b>FINANCING USES</b>				
Professional Services	1001310	52240	G0001	\$19,400
<b>TOTAL FINANCING USES</b>				<b>\$19,400</b>

**JUSTIFICATION: (attach letter if required)**

**REQUESTED BY:** \_\_\_\_\_ **REVIEWED & APPROVED BY:** \_\_\_\_\_

Date                      Department Head                      Date                      Administrative Services

**APPROVED BY:** \_\_\_\_\_

Date                      City Manager

**PASSED AND ADOPTED** by the City Council of the City of Paso Robles, State of California, this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_. Agenda Item No. \_\_\_\_\_

**ATTEST:** \_\_\_\_\_  
Deputy City Clerk