



# Hidalgo County, Texas

*Proposal to provide Director of Budget and Management recruitment services*

**April 27, 2022**



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*Delivered electronically*

Dear Mr. Belmarez:

Baker Tilly US, LLP (Baker Tilly) appreciates the opportunity to submit the following proposal for executive recruitment services to Hidalgo County (the County) to help you identify your next Director of Budget and Management. We believe that our record of successfully placing qualified and very accomplished professionals, along with our extensive experience providing executive recruitment services to cities, counties and other public-sector organizations nationwide, will be beneficial for your recruitment and will allow us to find the candidate who has the traits, skills, experience and overall competence you desire for your organization.

We know that you have options when it comes to selecting an executive recruitment firm. However, we believe that our unique approach, highly regarded customer service, record of success, our experience and overall ability to identify, recruit and place top-level executives in similar roles, sets us apart from our competitors. Additionally, we offer the following unique features:

- Customized profile development
- Proprietary management/leadership assessment reports
- Link to one-way semifinalists' video interview responses to position specific questions
- Proprietary online application and document management tool

This proposal details about our approach, expertise, references and pricing for this executive recruitment. The Baker Tilly team would consider it a professional privilege to provide these services to Hidalgo County.

Very truly yours,

BAKER TILLY US, LLP

A handwritten signature in black ink, appearing to read 'E. Williams'.

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# Executive summary

*What makes Baker Tilly different from other firms? Our solution truly begins by listening to what Hidalgo County needs.*

## Understanding your needs to achieve your objectives

We understand Hidalgo County is looking for a timely, effective, efficient, responsive, well-managed and thorough search process to recruit and identify highly qualified candidates for you to identify your next Director of Budget and Management.

Baker Tilly public sector executive recruiters will work with you or your designated staff, to understand the traits, attributes, capabilities and overall qualifications that are most important to your organization for this recruitment. The information we gather helps us customize colorful and informative marketing, recruitment and outreach strategies, and materials that present Hidalgo County as an organization committed to providing its citizens and communities with the most effective and efficient delivery of services in a quality and cost-effective manner with measurable outcomes and to work with integrity, responsibility and honesty to achieve excellence for the good of all of its citizens by providing an accessible local government through effective and efficient delivery of services. Furthermore, we will seek candidates that will work toward achieving the County's goals of providing sustainable economic development throughout the County, providing citizens with accessible local government providing the infrastructure necessary to ensure the most enjoyable quality of life for its residents, providing the best in public service and protecting, preserving and caring for the County's environment and promoting its natural and man-made beauty. Additionally, we present the County as a subtropical climate with many recreational facilities in the County such as the Hidalgo County Historical Corridor, the Santa Ana National Wildlife Refuge and the Las Palomas Wildlife Management area and special events such as the Citrus Fiesta, the Weslaco Sugarfest and the Rio Grande Valley Stock Show.

We recognize that there is significant competition for experienced local government managers, leaders and executives today. For this reason, we work with you to develop recruitment strategies that include an aggressive marketing, recruiting and candidate outreach campaign. As you know, a successful recruitment often depends upon the ability to reach successful executives who may not necessarily be in search of new employment opportunities or who may be waiting for the right opportunity. Thus, we use our existing resources, successful methods and approaches to inform and encourage qualified professionals to consider and apply for opportunities such as those you may have in your organization. We believe that these efforts are essential to ensuring that your County receives and can select from many qualified candidates.

Baker Tilly manages and tracks applicant information and provides regular communication, updating the applicants on the status of each recruitment. Our communications are always professional and respectful.

We take pride in our ability to provide your County with comprehensive details and information about each candidate we present; expanding beyond applications, cover letters and resumes to better understand, compare and contrast individual professional experience, leadership traits and the management style he or she would bring to your organization. Furthermore, we explore and attempt to

understand their motivation for pursuing each career opportunity. We also can provide you with a fully customized interview process to include suggested questions, interview day scheduling and planning, as you deem necessary or appropriate. Additionally, the lead consultant is available to you, or your designee, before, during and after each interview session and can facilitate your deliberations and employment offer and negotiations with the individual you select as finalist.

*Dr. Edward Williams, project team leader, will lead your recruitment out of our Plano, Texas office.*

Our highly regarded executive recruitment process includes five major tasks:

TASKS	PROCESS
<p><b>1. Recruitment brochure development and advertising</b></p>	<ul style="list-style-type: none"> <li>- We schedule and meet with Hidalgo County’s leadership team members to understand your leadership vision, strategic direction and candidate expectations, then use the information we gather to develop a candidate profile, which will require your input and final approval. We consider the profile our search baseline.</li> </ul>
<p><b>2. Execution of recruitment strategy and identification of quality candidates</b></p>	<ul style="list-style-type: none"> <li>- Using the profile you approve, we develop a colorful, informative and appealing brochure, then embark on a national or regional targeted marketing, recruitment and outreach campaign to identify individuals who best match your desired profile.</li> <li>- Additionally, we simultaneously launch a direct applicant outreach campaign targeting eligible prospects who we identify by building a detailed query into our searchable applicant database.</li> <li>- Using our proprietary applicant tracking system, we communicate with all applicants about the process, established timelines and next steps in the process.</li> </ul>
<p><b>3. Screening of applications, review of semi-finalists and selection of finalists</b></p>	<ul style="list-style-type: none"> <li>- Once we identify those applicants who most closely match your desired profile, we assign them several tasks including our Due Diligence Questionnaire and Candidate Questionnaire, while the project team conducts a comprehensive web and social media scan to elicit information that could be relevant to employment and continuation in our process.</li> <li>- We also provide selected applicants with a link that will take them to our proprietary one-way video interview portal. There, the candidates complete a one-way video interview, answering questions designed to give us an additional perspective on each applicant’s candidacy as it relates to your desired profile.</li> <li>- Once we gather the responses from the items listed above, we prepare and provide you with an electronic (PDF) Semi-Finalists Report listing 10 to 15 applicants who best appear to meet your desired profile. This report includes a list of all applicants and copies of resumes, cover letters and Due Diligence Questionnaire responses.</li> <li>- We then ask you to identify four or five, plus one alternate, as finalists. We then ask this group to complete our management and leadership style</li> </ul>

TASKS	PROCESS
	<p>assessment, which provides us with additional information, including development needs, strengths, personality and behavior analysis. This tool provides us with information about each finalist, which we have found to be important to the selection process.</p>
<p><b>4. Background report checks, reference checks, social media presence, academic verifications</b></p>	<ul style="list-style-type: none"> <li>– We secure authorization from each finalist to conduct a comprehensive background check and reports.</li> <li>– We obtain a list of up to ten current or former supervisors, peers or direct reports from each finalist to contact as references.</li> <li>– We provide you with a report summarizing all responses to our customized reference questionnaire.</li> <li>– We verify academic credentials and professional certifications.</li> <li>– We conduct an exhaustive review of social and electronic media sites and other publications, to identify any information that may be relevant to the hiring of everyone you interview.</li> <li>– We provide a comprehensive reference check and report for each finalist.</li> </ul>
<p><b>5. Final interview process</b></p>	<ul style="list-style-type: none"> <li>– Once you identify your finalists, we work with your designated staff to design, prepare and provide technical support to ensure a smooth, effective and efficient interview process, which may include the scheduling and support for virtual interviews. If requested, we work with the selected finalist and your designated staff to finalize an employment agreement.</li> </ul>

# Meeting your needs with our resources

*Hidalgo County's recruitment will be national and inclusive in nature, with a candidate pool of diverse, experienced and talented individuals.*

## Offering our resources: Baker Tilly at a glance

We dedicate ourselves to delivering efficiency, quality, creativity, innovation and forward-thinking solutions. We are passionate about enhancing and protecting our clients' value, which is a collective effort by everyone across our firm.

Hidalgo County will receive an exceptional experience for your County leadership team and – ultimately – your citizens. Below are some key facts about our firm.



**9th**

largest accounting and advisory firm in the U.S.



**100+**

finance recruitments



**400**

recruitments since 2017



**60+**

office locations across the U.S.



**250+**

workplace and culture awards

### COMPREHENSIVE EXPERIENCE TO SERVE YOU

*Hidalgo County will receive support and guidance from a respected firm that continues to grow – as evidenced by INSIDE Public Accounting naming Baker Tilly as the ninth largest accounting firm in the U.S. on their 2021 Top 400 Firms list.*

## Celebrating 90+ years in serving our valued clients

As a future-looking firm, we celebrate 90+ years in the marketplace by honoring our roots and continuing to shape our future. We embrace the fact that business can't stand still – and we won't stand still. As we help our clients identify new needs and opportunities, we innovate and change to work better. We celebrate where we came from and how far we have come – which is essential to knowing who we are and where we are headed.




Our roots took hold in 1931 in Waterloo, Wisconsin, where we began as a public accounting firm specializing in canning factory audits. Since that time, we have grown with more than 40 different combinations, each with its own rich history, expanding our presence coast to coast and globally and our scope across industries, services and areas of expertise.

One thing has not changed in 90 years: **our shared passion for enhancing and protecting our clients' value.**

As we reimagine our lasting impact, we remain grounded in our timeless core values. Through dedication, creativity and never standing still, Baker Tilly will become more connected to our clients, our people, our communities and our profession.

## Standing on our values

Our core values infuse our culture and drive the way we plan to work with Hidalgo County. They are what we believe and what we expect from each other. They guide our decisions, inspire our actions and gauge how we do business. They are shorthand for what we stand for — and what we stand against. Our core values are fundamental and timeless and come to life through our own experiences and personal expression. Our core values are highlighted below.

				
<b>BELONGING</b>	<b>COLLABORATION</b>	<b>INTEGRITY</b>	<b>PASSION</b>	<b>STEWARDSHIP</b>
<p>We foster a deep level of mutual respect where each one of us feels seen, heard, valued and connected. We commit to a diverse and inclusive workplace upheld by fairness, compassion and equality.</p>	<p>We are at our best when we work together. We build on our collective strength to achieve more than we can as individuals.</p>	<p>We do the right thing, for the right reason, every day. Honesty, trust and keeping our promises are paramount to our success.</p>	<p>We put forth our best effort every day for the benefit of our people, clients and firm. There is a sense of urgency and relentless energy in everything we do. We love our profession and take great pride in it.</p>	<p>We invest for the future with the intention of leaving everything better. We strive to make a positive difference and leave a proud legacy.</p>

### SHARED CULTURES, VALUES, PHILOSOPHIES AND GOALS

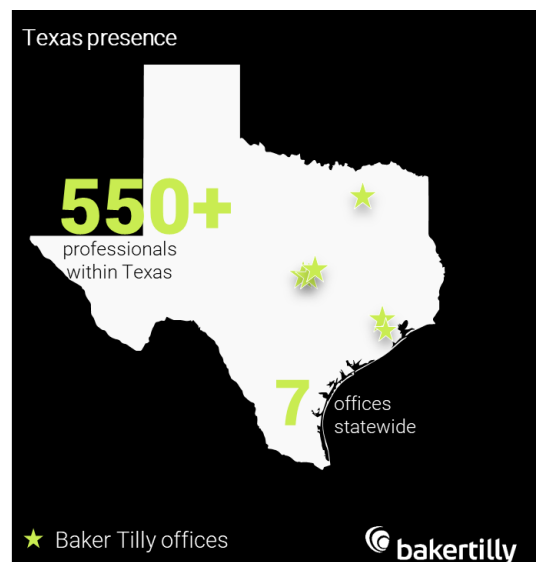
*Hidalgo County and Baker Tilly have a strong cultural fit, and our commonalities will lay the foundation for trust, open communication, a seamless project approach and an enduring relationship.*

## Pairing local services with national resources

Hidalgo County will be a valued client, and you should expect to receive exceptional service. To be accessible and responsive to Hidalgo County year-round, your engagement team will be led from our Plano office to minimize travel costs, strengthen the relationship and improve efficiencies.

Baker Tilly’s presence in Texas includes seven offices in the Lone Star state. Baker Tilly has more than 550 professionals statewide, including Dallas and Houston. Our professionals have been serving the area for more than 20 years and support a diverse client base in the state.

In recent years, Baker Tilly’s Texas presence expanded dramatically — both through organic growth and through strategic combinations with local firms — to serve our growing number of Texas clients. We are well-versed in state regulatory requirements and value our local government clients throughout Texas including, but not limited to, the following entities:



## MEETING YOUR NEEDS WITH OUR RESOURCES

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- City of Athens
- City of Baytown
- City of Corpus Christi
- City of Dallas
- City of Denton
- City of DeSoto
- City of Midland
- City of Missouri City
- City of North Richland Hills
- City of Paris
- City of Port Arthur
- Dallas Area Rapid Transit Authority
- North Texas Municipal Water District
- Tarrant County College District
- West Travis County Public Utility Agency

For Baker Tilly, the safety of our people is paramount. We are committed to playing our part in containing COVID-19 by practicing responsible social distancing. Hidalgo County's engagement team has various tools enabling them to assist you from any location. Baker Tilly professionals each receive their own laptop and remote access credentials to connect to our internal network from outside the office. When Baker Tilly and Hidalgo County are not able to meet in person, we utilize Microsoft Teams to quickly set up online meetings. Microsoft Teams does not require an account to use, nor does it require any downloaded applications. It's as easy to use as simply clicking on a link. **Please understand that we are prepared to deliver an exceptional service experience remotely if necessary.**

The Baker Tilly executive recruitment team will work closely with Hidalgo County's designated point of contact to develop alternative methods to complete all aspects of our established search processes using existing technologies and ensuring the overall safety of all involved, which may require virtual or telephonic meetings or interviews. Notwithstanding, we will creatively collaborate with your organization to gather and provide you with critical information essential to your hiring decisions.

When the time arrives for the County to interview candidates, we will respect and comply with the guidelines established and recommended by local, state or federal, public health or medical professionals, including social distancing and related guidelines or protocols, as necessary.

### **Cultivating an engaging culture to offer a consistent team for Hidalgo County**

Exceptional professionals thrive at Baker Tilly because we cultivate an engaging culture through diversity and inclusion, work-life balance, continuous learning opportunities, career advancement and employee recognition.



# Project understanding and approach

*Our relationship-driven approach is led by a project team who delivers a cost-effective, quality engagement for Hidalgo County. We will deliver executive recruitment solutions that address the state and local government industry's underlying complexities and your unique opportunities.*

## The Baker Tilly executive recruitment process

### *Task I: kickoff, marketing, recruitment and outreach*

Our comprehensive recruitment process begins with the development of a detailed marketing and recruitment brochure, which includes specific details, outlined in the candidate profile, which we consider the most important first step in your recruitment process. The candidate profile includes important details such as required and desired education, professional certifications, professional experience, leadership traits and attributes, management style and related personal characteristics. These qualifications may serve as predictive indicators of the success of your next Director of Budget and Management. The recruitment brochure will also include key information about your city, community and information that captures and conveys the essence of your organization.

To launch the project, the project team leader will meet (on-site or virtually as allowed by established social distancing and stay at home regulations) with County's designee to discuss your desired and required qualifications and coordinate stakeholder input, upon the direction of the County. During this meeting, we also gather information on your strategic initiatives, goals and objectives, organizational culture, reporting structures and similar information. Additionally, we attempt to understand the overall scope and responsibilities of your next Director of Budget and Management, including individual and organizational goals. We also attempt to understand the key issues, challenges and opportunities your Director of Budget and Management will face. Additionally, we gather information about the total reward (compensation and benefits) you offer for this position. [See example of a recruitment brochure in **Appendix I**.]

Once we gather all necessary information, we prepare a draft recruitment brochure for your review and approval. We then update the brochure or make your suggested edits or revisions, then launch your executive search. As you can see, the candidate profile is central to our strategy and outreach.

### **ADVERTISEMENTS FOR THE DIRECTOR OF BUDGET AND MANAGEMENT COULD BE PLACED WITH:**

- Association of Certified Chief Financial Officers
- Government Finance Officers Association
- Texas Municipal League
- Careers in Government (careersingovernment.com)
- LinkedIn
- International City/County Management Association
- National Forum of Black Public Administrators
- Local Government Hispanic Network

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Position profile and recruitment brochure development	<ul style="list-style-type: none"> <li>– Onsite or virtual interview with the County</li> <li>– Baker Tilly will receive information regarding Hidalgo County’s budgets, organizational charts, images, logos, etc.</li> <li>– Develop draft documents (recruitment brochure, advertisement, marketing letter and timeline)</li> </ul>	2 weeks
Approve brochure, begin advertising and distribute marketing letter	<ul style="list-style-type: none"> <li>– Brochure sent to the County for final approval</li> <li>– Begin advertising and distribution of recruitment brochure</li> </ul>	2 weeks

**Task II: execution of recruitment strategy and identification of quality candidates**

The Baker Tilly project team leader, utilizing the information gathered during Task I of our process, also works with the County’s designated staff to develop a broad and far-reaching marketing and advertising campaign. We believe this step enhances our ability to notify and invite potential candidates from a talented and diverse pool of professionals. Our team will also advertise your vacancy in relevant and appropriate national professional publications, membership organizations and known recruitment websites. We further believe that our highly trafficked [website](#), which includes an exclusive location dedicated to highlighting your vacancy, also encourages potential candidates to consider this opportunity.

Our exhaustive marketing, recruitment and outreach campaign includes a national, state, regional or local scope, as you direct. Another important and essential factor that sets us apart from our competition is the ability to customize queries and search our extensive database of former applicants or former candidates in prior searches. Many of the individuals in our database have manifested interest in specific opportunities, organization size or geographic locations. We view this as an additional opportunity to identify a larger pool of potentially great applicants for your position.

We believe that often times, well-qualified candidates are not actively seeking new employment opportunities. In fact, most may not be actively reviewing job postings or even responding to advertised announcements. However, when we present a potential applicant with key information about an exciting new opportunity, many times they will review, consider and apply for the position, especially if presented by a trusted, experienced firm or a member of their network. We take pride in our ability to locate diverse, highly qualified candidates across the nation based on the professional contacts and relationships we have developed and nurtured over many years.

We supplement our outreach by querying our customizable database, which includes information on recent and past applicants for similar positions. This provides the Baker Tilly team with the ability to customize applicant flow and tracking and communicate inquiries for candidates based on characteristics important to Hidalgo County such as geographic location, particular experience, expertise and credentials.

During this part of our process, the project team leader will work with the County’s designee to reach consensus on the leadership traits and management style you desire your next Director of Budget and Management will bring to your organization. Additionally, we identify the qualifications, experience and education you desire and/or require. We then use our proven strategies to identify other key competencies and work values that many organizations would typically associate with individual success in similar positions nationwide.

## PROJECT UNDERSTANDING AND APPROACH

Each candidate submitting a resume is sent a timely acknowledgement by our team, including an approximate schedule for the recruitment. Throughout the recruitment process, communication is maintained with each candidate regarding information about the recruitment progress and their status in the process. We take pride in the many complimentary comments made by candidates regarding the level of communication and the professional way they are treated during our recruitments.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
<b>Execution of recruitment strategy and candidate outreach</b>	<ul style="list-style-type: none"> <li>- Online data collection and profile development</li> <li>- Development of interactive, searchable applicant database for recruitment of your Director of Budget and Management</li> <li>- Baker Tilly performs direct outreach to prospective candidates identified in the recruitment strategy</li> <li>- Utilization of extensive applicant database to identify applications and review applicant pool for competencies/demographics</li> </ul>	4-5 weeks

### *Task III: screening of applicants and recommendation of semi-finalists*

During Task III, the project team screens each application and compares qualifications (education, experience, etc.) and responses to our customized supplemental questions to determine an overall match to your desired profile. This measure helps us review the overall accuracy and efficiency of our classification and review process. We then narrow the list to a group of 10 to 15 semifinalists for review and identification of four or five finalists (often including an alternate) or the number of individuals you would like to interview and consider.

Another unique aspect of our recruitment process is our use of our proprietary, web-based one-way video interview. Each finalist has a limited number of minutes to answer each question, which each applicant sees for the first time when the interview begins. We do not provide questions in advance. Each finalist then has 30 seconds to respond. This tool allows our team to develop a more comprehensive understanding of each candidate’s ability to “think quickly.” The one-way videos also allow us to evaluate the professional demeanor of each applicant. Our team will provide the County and others designated with a link to review.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
<b>Applicant screening and recommendation of semi-finalists</b>	<ul style="list-style-type: none"> <li>- Baker Tilly compares applications to the approved candidate profile, developed in our searchable applicant database</li> <li>- Most promising applicants are asked to complete candidate questionnaires and provide due diligence information</li> <li>- Media, internet and social media scan for information pertinent to future employment</li> <li>- Top candidates identified as semi-finalists</li> <li>- Semi-Finalist Report is prepared, including the brochure, master applicant list, cover letter and resume of candidates to be considered</li> </ul>	2-3 weeks

	<ul style="list-style-type: none"> <li>- Baker Tilly and the County review and rate video interviews</li> <li>- Baker Tilly sends links to stakeholders to review the aggregate responses and ratings</li> <li>- Project team leader meets with the County to review recommended semi-finalists</li> <li>- County selects finalists for on-site interviews</li> <li>- Finalists complete candidate management style assessment, responses are reviewed and interview questions are developed</li> </ul>	
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**Task IV: conducting background checks, reference checks and academic verifications**

Once the County has identified a list of “Finalists” Baker Tilly begins the process of conducting reference checks, background report checks and academic verifications. We then prepare a Confidential Reference Report to complete our research and understanding of each applicant’s qualifications, management style, leadership traits or characteristics and professional work performance.

BACKGROUND CHECKS WILL INCLUDE INFORMATION FROM THE FOLLOWING AREAS:	
- Consumer credit	- Bankruptcy
- City/county – criminal	- State district Superior Court – criminal
- City/county – civil litigation	- State district Superior Court – civil litigation
- Judgment/tax lien	- Federal district - criminal
- Motor vehicle driving record	- Federal district – civil litigation
- Educational verification	- Sex offender registry

**To ensure the overall quality standards of our process, we require a minimum of 10-15 business days between the time you identify finalists for interviews, (onsite or virtual) and the time we are able to provide you with our Final Report which includes all information gathered throughout the process.**

PROJECT MILESTONE	DELIVERABLES	TIMELINE
<b>Design final process with the County for on-site interviews with finalists</b>	<ul style="list-style-type: none"> <li>- Baker Tilly confirms interviews with candidates</li> <li>- Travel logistics are scheduled for candidates</li> </ul>	1-2 days
<b>Background checks, reference checks and academic verification</b>	<ul style="list-style-type: none"> <li>- Baker Tilly completes background checks, reference checks and academic verifications of finalists</li> </ul>	2-3 weeks

**Task V: final interview process**

Upon completion of Task IV, we will work with your County and designated staff to develop the final interview process. We customize the process according to your needs and desired outcomes, functions of the position, preference and directives. This may include steps that are important to you, our client. As such, the final interview process may include meetings with the department heads and the opportunity for a meet and greet with community members. Recognizing the impact of national, state or locally imposed restrictions in response to the COVID-19 Pandemic, we work with your organization to adjust all aspects of our process as you deem necessary and appropriate.

Prior to the interviews we provide documentation on each of the finalists, highlighting leadership and management profile (Gap Analysis) and a summary of our comprehensive/customized reference checks, background report checks and academic verifications. In addition, the Final Report will include guidelines for interviewing the candidates, suggested interview questions and a candidate assessment process for your interview panel(s).

The project team leader will be available during the final interview process to answer questions about the candidates and, if requested, assist with the final evaluation of the candidates. If requested, we will assist the County with the development of a compensation package and related employment considerations and assist with the negotiation of an employment agreement.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
<b>Final Report prepared and delivered to the County</b>	<ul style="list-style-type: none"> <li>Final Report is prepared including brochure, schedule, cover letter, resume, candidate questionnaire, suggested interview questions, candidate assessment form and management style probing questions</li> </ul>	1 day
<b>On-site interviews with finalists</b>	<ul style="list-style-type: none"> <li>Interviews are scheduled</li> <li>Recruitment project team leader attends client interviews and is available to participate during deliberations of candidates</li> </ul>	1-2 days
<b>Offer made/accepted</b>	<ul style="list-style-type: none"> <li>If requested, Baker Tilly participates in candidate employment agreement negotiations</li> <li>Baker Tilly notifies candidates of decision</li> <li>Baker Tilly confirms final process close out items with Hidalgo County</li> </ul>	1-2 days

### Our strategy for recruitment of diverse candidates

Our corporate core values and work environment reflect our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. We have established strong and credible networks with minority and female leaders nationwide. In addition, we are corporate members of the National Forum for Black Public Administrators (NFBPA) and the Local Government Hispanic Network and are on their National Corporate Advisory Council. We participate in their membership events on a regular basis.

To that end, we take responsibility for diversity in our organization, our recruitment strategy and our candidate pools. In every recruitment, we use our established networks to make direct and personal contacts with prospective minority and female candidates and encourage them to consider Hidalgo County’s Director of Budget and Management opportunity. Because of our performance record in presenting a diverse applicant pool, these prospective candidates know that the Baker Tilly executive recruitment team will fairly consider each application based on qualifications and the established profile.

Baker Tilly is committed to ensuring equitable participation in our business and employment opportunities without regard to race, color, religion, sex, national origin, age, disability, veteran status, marital status or sexual orientation. As a leader in the executive recruitment industry, we take positive actions to prevent and to remedy any discriminatory effects of business and employment practices.

## Triple guarantee

We define the success of a smooth, seamless, effective and responsive executive recruitment that culminates with the hiring of an accomplished Director of Budget and Management who matches the profile we developed to this end. We further define success by the identification and presentation of an acceptable number of well-qualified applicants for the County to interview.

While we believe in the overall success of our process, we also recognize that unusual circumstances will invariably emerge. Therefore, we offer an industry leading triple guarantee.

1. First, we commit to conduct your recruitment until you have selected a finalist and made an appointment for the fees and tasks quoted in this proposal. In the event you are unable reach an employment agreement with one of the individuals presented as finalists, Baker Tilly will identify and present a second supplemental group of qualified applicants for you to consider until you select a finalist.
2. Second, we guarantee your executive recruitment for 12 months against separation (voluntary or involuntary), which means that if you end the employment relationship (with or without cause) or the finalist resigns (for any reason) we will repeat the executive search at no additional professional fee but will include project-related expenses. *Please note that candidates appointed from within your organization do not qualify for this guarantee. Furthermore, this guarantee is subject to further limitations and restrictions of your state laws.*
3. Baker Tilly will not directly solicit any candidate selected under this agreement, for any other position, while the candidate remains in your employ.

*Your time is valuable, and one significant way we will add value to Hidalgo County is by delivering our services on time.*

### Meeting your deadlines

The following is an example of a timeline for an executive recruitment process. The Baker Tilly project team leader will discuss your anticipated or desired timeline during the initial kickoff meeting. It is our intent to conduct your recruitment expeditiously, but not at the expense of finding qualified applicants to present to you. For this proposal target dates are to be determined. Once you approve, and based on mutual agreement, we will provide actual dates in our service agreement.

PROJECT MILESTONE	DELIVERABLES
<b>Profile development, advertising and candidate outreach</b>	<ul style="list-style-type: none"> <li>- Baker Tilly completes on-site interviews to develop candidate profile and recruitment brochure; County approves ad placement schedule and timeline</li> <li>- Baker Tilly sends draft recruitment brochure to the County</li> <li>- The County returns draft recruitment brochure (with edits) to Baker Tilly</li> <li>- Baker Tilly commences executive recruitment advertising and marketing</li> <li>- Online data collection and profile development</li> </ul>
<b>Applicant screening and assessment and recommendation of semi-finalists</b>	<ul style="list-style-type: none"> <li>- Baker Tilly commences formal review of applications, most promising candidates complete questionnaires</li> <li>- Candidates complete recorded interview online</li> <li>- Baker Tilly completes formal review of applications and sends selected resumes to the County for review</li> <li>- Candidates' recorded interviews are presented</li> <li>- Baker Tilly meets with the County and recommends semi-finalists; County selects finalists for on-site interviews</li> <li>- Finalists complete candidate management style assessment and responses are reviewed and interview questions are developed</li> </ul>
<b>Comprehensive background check, academic verifications and reference checks completed for finalists</b>	<ul style="list-style-type: none"> <li>- Baker Tilly completes reference checks/background checks/academic verification on finalists</li> </ul>
<b>On-site Interviews with finalists</b>	<ul style="list-style-type: none"> <li>- Baker Tilly sends documentation for finalists to the County</li> <li>- The County conducts on-site interviews with finalists</li> </ul>
<b>Employment offer made / accepted</b>	<ul style="list-style-type: none"> <li>- The County extends employment offer to selected candidate</li> </ul>

**COMMITMENT TO SUCCESSFULLY DELIVER RECRUITMENT SERVICES TO MEET HIDALGO COUNTY'S REQUIREMENTS**  
*Hidalgo County's time is valuable. We will co-develop a timeline to provide executive recruitment services on time.*

## Why Baker Tilly is ideally suited to serve Hidalgo County

Following are just some of the ways Baker Tilly has distinguished itself from peers in public sector executive recruitment.

DIFFERENCE	HOW BAKER TILLY DISTINGUISHES ITSELF FROM OUR PEERS
<b>We are experienced and passionate about what we do</b>	Baker Tilly executive recruitment consultants are experienced and passionate about local government since all have spent a significant part of their professional careers in senior leadership positions for cities, counties and school districts. The Baker Tilly team has recruited and placed more than 1,400 executive-level positions within cities, counties, school districts and public and not-for-profit organizations since 2000.
<b>We are focused on exceeding your expectations</b>	We believe in local government and want to assist Hidalgo County in building a great team. We want your organization to hire us again based on the success we achieve the first time we work together.
<b>We believe that “ethical business practices” are a catalyst for success</b>	These practices include operating with transparency, responsiveness and sensitivity to the culture of your organization while pursuing an unrelenting commitment to high quality professional services.
<b>We believe in diversity</b>	Our corporate core values and work environment reflect our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. We take responsibility for diversity in our organization, our recruitment strategy and our candidate pools. We are corporate members of the National Forum for Black Public Administrators (NFBPA) and the Hispanic Network and are on their National Corporate Advisory Council.
<b>We conduct a timely, high-quality recruitment that is within budget</b>	For an all-inclusive, not-to-exceed professional fee, which includes the cost of professional services by the project team leader, the project support staff and all project related expenses such as advertising, preparation of a recruitment brochure, background, reference and academic verification checks and travel expenses for up to three on-site visits. We work with you to establish a timeline, respond to the County’s needs and to unexpected circumstances that may arise during your recruitment in order to expedite the recruitment, but not at the expense of finding high quality candidates for Hidalgo County.
<b>We utilize the latest technologies that uniquely sets us apart</b>	Technology plays a key role in the Baker Tilly executive recruitment process. From our proprietary video interview system and our management/leadership style assessment analysis to our proprietary online application system, we efficiently manage candidate information and provide the County with unique information about each candidate’s leadership and management style and ability to respond extemporaneously to video questions.
<b>We offer a “Triple Guarantee” that commits Baker Tilly to the County’s success</b>	<ul style="list-style-type: none"> <li>– We remain focused to assist with your executive recruitment until you make an appointment</li> <li>– We guarantee your executive recruitment for 12 months against termination or resignation for any reason – or we come back to fill your Director of Budget and Management position for no additional professional fee</li> <li>– We will not directly solicit any candidates selected under this contract for another position while employed with your organization</li> </ul>

**BAKER TILLY DIFFERENTIATES ITSELF FROM OTHER EXECUTIVE RECRUITMENT FIRMS**

*We understand best practices within the executive recruitment space.*

## Benefits to Hidalgo County

Selecting Baker Tilly to conduct your executive recruitment provides you with the following benefits:

BENEFIT	FURTHER DETAILS
<b>Comprehensive and structured process</b>	Our process is comprehensive and seamless, reflecting our years of interaction with local government employers and prospective candidates.
<b>Transparency</b>	Baker Tilly comes to Hidalgo County without having any preconceived notions or expectations about the County and prospective candidates. The Baker Tilly team works closely with the County to make sure the process is transparent.
<b>Confidentiality</b>	Prospective candidates know that their application will be kept confidential, allowing them to express interest in the Director of Budget and Management position without jeopardizing their current employment. Our reputation for ensuring candidate confidentiality as permitted by state and local laws, means that the County can count on maximizing the number of qualified candidates interested in the position.
<b>Candidate recruitment</b>	Baker Tilly actively recruits qualified candidates, drawing from our extensive personal and professional connections with capable individuals around the state, region and nation, and assuring the County of its access to established managers and rising stars. The ability to widely recruit for prospective candidates is one of the primary benefits of using Baker Tilly.
<b>Focused use of the County's time</b>	Baker Tilly's comprehensive process incorporates the active participation of County appointing authorities at key steps in the process. Our process keeps decision makers fully advised and informed of all aspects of the process without requiring them to expend substantial amounts of time on the recruitment process or putting aside other pressing issues facing the County.
<b>Minimize staff disruption</b>	Baker Tilly's search process also minimizes disruptions to Hidalgo County's staff, some of whom may have additional duties in this time of transition. Because conducting a thorough recruitment can be time-consuming, Baker Tilly's involvement allows staff to stay focused on their primary and assigned functions.
<b>Thorough evaluation of candidates</b>	Hidalgo County seeks a Director of Budget and Management of sound professional and personal character. Baker Tilly's process includes a thorough evaluation of the final candidates, including detailed information from references and a careful review of background records.

**THERE ARE NUMEROUS BENEFITS TO UTILIZING BAKER TILLY FOR YOUR EXECUTIVE RECRUITMENT NEEDS**

*We strive to distinguish ourselves from peer organizations.*

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# Your Value Architects™

*Hidalgo County will work with a consistent team of Value Architects™ who understand your organization and can add value from day one. The combination of your engagement team's state and local government experience and service expertise translates into tangible results for the County.*

## Aligning key engagement team members with your goals

Within Baker Tilly, our executive recruitment team consists of ten recruitment consultants and project coordination staff available to meet your executive recruitment needs. Each consultant assigned to your recruitment has experience working with cities, counties, special districts, not-for-profit organizations and school districts, and the many different disciplines that comprise Hidalgo County's organization. Our consultants bring an experienced, participatory and energetic perspective to each engagement. As such, we reflect our unique approach and individualized touch in our internal standard and commitment to outstanding service that meets or exceeds your expectations. Since 2017, our combined consultant team has conducted nearly 400 executive searches.



The Baker Tilly project team will collaborate with the County's designated staff as your technical advisor. As such, we conduct our recruitment processes in a clear, effective, efficient, transparent and professional manner consistent with "best practices" in the public sector executive recruitment space. Our agenda is clear; *"our agenda is your agenda."* Our objective is to generate a reasonable list of highly qualified candidates and assist you with the screening and evaluation of these candidates to identify your next Director of Budget and Management.

We have structured the Baker Tilly project team to draw upon our 60-plus years of collective service to the public sector and to leverage Baker Tilly's experience and capacity to find exceptional, qualified candidates.

Since its beginnings, our firm has emerged as a leader in human resource management consulting and executive recruitment. It is our 30+ years of consulting experience, coupled with our unique approach and personal touch that drives our internal standard for delivering outstanding services and leading-edge products.

Your handpicked team of professionals offers a collaborative focus supported by the breadth and depth of our firm's national resources. We believe in strong personal relationships, and this means a personal interest in Hidalgo County from some of our most experienced team members. Engagement team members are introduced below and complete resumes are available in **Appendix II**.

The proposed project team represents experienced professionals who will be working on your Director of Budget and Management recruitment. As such, we have selected a team of consultants who understand the traits, attributes and characteristics essential to success in this position to meet four specific objectives for your organization. First, this team represents experienced professionals who will directly champion every aspect of your project to a successful culmination. Second, the team brings a range of expertise to identify and classify competent applicants according to your business service requirements. Third, this team brings a national perspective, experience and the knowledge necessary to achieve your established objectives. Fourth, our approach exemplifies our commitment to personal and professional responsibility for the services and outcomes we deliver to Hidalgo County.

**INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR HIDALGO COUNTY**

***Engagement leadership***



**Edward Williams, Ph.D., Director – Practice Co-Leader**

2500 Dallas Parkway, Suite 300, Plano, TX 75093  
 +1 (214) 842 6478 | [edward.williams@bakertilly.com](mailto:edward.williams@bakertilly.com)

Edward co-leads Baker Tilly’s public sector executive recruitment team. He has more than 20 years of collective experience in human resources and organizational development at various levels and across various disciplines including, state and municipal government, community and educational institutions. His areas of expertise include human development, process improvement, workforce planning, executive recruiting, strategic planning, management and leadership development, classification, compensation, benefits administration, performance management, employee recognition, employee wellness and benefits administration. He has served as director of human resources and organizational development, for the City of Missouri City, deputy personnel director for the State of Missouri and training and performance consultant for the Metropolitan Community Colleges Business and Technology Center in Kansas City, Missouri. Edward holds a Ph.D. in Educational Leadership and Policy Analysis from the University of Missouri, Educational Specialist degree in Higher Educational Administration, Master of Higher Education Administration, and Bachelor’s in Education from the University of Missouri. He is bilingual and proficient (reading, writing and speaking) in the Spanish language.

***Consulting team***



**Art Davis, Director**

5440 West 110th Street, Suite 300, Overland Park, KS 66211  
 +1 (816) 868 7042 | [art.davis@bakertilly.com](mailto:art.davis@bakertilly.com)

Art is a director in Baker Tilly’s executive recruitment practice. He is responsible for managing and conducting executive recruitment engagements for the firm to ensure their integrity, timeliness and adherence to budget parameters. He has more than 30 years of experience in local government, executive recruitment and organizational management. Art has served as a city administrator in Missouri and in other local government positions in Kansas. He specializes in providing executive recruitment and organizational management consulting services for cities, counties and not-for-profits. Art earned a Master of Public Administration from the University of Kansas as well as a Bachelor of Arts, political science and public administration from William Jewell College.

## INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR HIDALGO COUNTY

*Consulting team***Patricia Heminover, Director**

30 East Seventh Street, Ste. 3025, St. Paul, MN 55101  
 +1 (651) 223 3058 | patty.heminover@bakertilly.com

Patty has been with the firm since 2010. She has more than 20 years of public education experience, most recently as superintendent of South St. Paul Schools in South St. Paul, Minnesota. She brings considerable experience developing budgets, leading organizational and process improvements and successfully overseeing conflict resolution. Patty was also South St. Paul Schools' director of human resources and finance, prior to serving as its superintendent. She served for three years as the co-superintendent of schools for Cleveland Public Schools in Cleveland, Minnesota, after working as its director of human resources and business services for six years. Patty has received a School Finance Award, technology leadership awards and helped establish the first K-12 International Baccalaureate School District in Minnesota. She earned a Master of Education Administration from Minnesota State University.

**Sharon Klumpp, Director**

30 East Seventh Street, Ste. 3025, St. Paul, MN 55101  
 +1 (651) 223 3053 | sharon.klumpp@bakertilly.com

Sharon is a director with Baker Tilly's executive recruitment team. She is responsible for managing and conducting executive recruitment engagements for the firm to ensure their integrity, timeliness and adherence to budget parameters. She has worked on behalf of local governments for more than 35 years and partnered with them to build strong organizations. Sharon has served in city administration roles in Minnesota and Michigan and executive positions for two large local agencies. She specializes in providing executive recruitment, organizational management, and facilitation services to local governments and nonprofits. Sharon holds a Master of Public Administration from the University of Kansas as well as a Bachelor of Arts in political science from Miami University.

**Anne Lewis, Director**

8219 Leesburg Pike, Suite 800, Tysons, VA 22182  
 +1 (703) 923 8214 | anne.lewis@bakertilly.com

Anne co-leads Baker Tilly's public sector executive recruitment team. Prior to joining Baker Tilly, Anne served as an assistant county administrator for a Virginia county, a deputy city manager and an assistant city manager for two Virginia cities. Over the last 17 years, her experience in local government has also included positions as an emergency management deputy director, public information officer, human resources manager, parking authority executive director, housing director, transit director and convention & visitors bureau executive director. She also has had responsibility for parks, recreation and community services, information technology, animal services, general services and legislative programs. She specializes in providing executive recruitment services to local governments and nonprofits. Anne holds a Master of Science as well as a Bachelor of Science from Shenandoah University.

**INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR HIDALGO COUNTY**

***Consulting team***



**Cecilia Hernandez, MPA, Senior Recruitment Analyst**

2500 Dallas Parkway, Suite 300, Plano, TX 75093  
 +1 (214) 736 1606 | cecilia.hernandez@bakertilly.com

Cecilia is a senior recruitment analyst with Baker Tilly’s executive recruitment practice. She started as an intern in September 2017. In her role as recruitment analyst, she works with Baker Tilly consultants in the initial screening and vetting of candidates. She creates reports, submits profiles to conduct background checks and verification of their education, and keeps in contact with candidates throughout the complete recruitment process. Cecilia is experienced in working with local governments. Prior to employment with Baker Tilly, she worked in implementing retention of local government records. Cecilia holds a Master of Public Affairs from the University of Texas at Dallas with a Local Government Concentration and a Bachelor of Science in public affairs from the University of Texas.



**Michelle Lopez, Senior Recruitment Analyst**

30 East Seventh Street, Ste. 3025, St. Paul, MN 55101  
 +1 (651) 223 3061 | michelle.lopez@bakertilly.com

Michelle is a senior recruitment analyst with Baker Tilly’s executive recruitment practice group. She joined Baker Tilly in 2017 as a client development specialist, aiding the client representatives in the public finance group. She joined the executive recruitment practice group as a recruiting coordinator in May 2018. Her responsibilities include conducting research, organizing assignments and workflow, coordinating information and resources, and assisting candidates and clients through all phases of an executive recruitment. Michelle has an Associates in Arts degree and more than 10 years of experience supporting various departments, including information technology and human resources. She is currently pursuing a Bachelor of Science degree in project management.

**HIDALGO COUNTY WILL RECEIVE TANGIBLE RESULTS WITH BAKER TILLY**

*Hidalgo County’s engagement team members are committed to your success. Their industry experience and service expertise translate into tangible results for the County.*

# Valuable perspectives

*We are always happy to provide references because it is important for you to talk with the organizations we serve. Our similar client base equals experience-derived insights for Hidalgo County.*

## Demonstrating successful relationships with similar clients

Edward Williams is the designated project leader for your Director of Budget and Management executive search. We encourage you to connect with the clients below to learn more about the value of their relationship with Baker Tilly and to verify the quality of work Baker Tilly has consistently delivered to each client as part of these recently completed executive recruitment projects. Each client will offer a different perspective as you consider your own needs.

NORTH TEXAS MUNICIPAL WATER DISTRICT			
<b>Name</b>	Terry Sam Anderson	<b>Title</b>	Member, Board of Directors
<b>Phone</b>	+1 (214) 801 8112	<b>Email</b>	<a href="mailto:tsa@bjanderson.net">tsa@bjanderson.net</a>
<b>Services</b>	Recruitment of Executive Director/General Manager (2021)		
CITY OF CORPUS CHRISTI, TEXAS			
<b>Name</b>	Eyvon McHaney	<b>Title</b>	Human Resources Director
<b>Phone</b>	+1 (361) 826 3979	<b>Email</b>	<a href="mailto:EyvonMc@cctexas.com">EyvonMc@cctexas.com</a>
<b>Services</b>	Recruitment of Director of Community Health (current), Director of Neighborhood Services (current), Public Works Director (current), Director of Parks & Recreation (2022), Human Resources Benefits Manager (2022), Assistant City Manager (2021) and Director of Water Utilities (2021)		
FULTON COUNTY GOVERNMENT, GEORGIA			
<b>Name</b>	Kenneth L. Hermon, Jr.	<b>Title</b>	Director of Personnel
<b>Phone</b>	+1 (404) 613 0923	<b>Email</b>	<a href="mailto:Kenneth.Hermon@fultoncountyga.gov">Kenneth.Hermon@fultoncountyga.gov</a>
<b>Services</b>	Recruitment of Director of Elections (current) and Clerk to the Commission (2020)		
CITY OF PLANT CITY, FLORIDA			
<b>Name</b>	George Williams	<b>Title</b>	HR & Risk Management Director
<b>Phone</b>	+1 (813) 659 4200, ext. 4201	<b>Email</b>	<a href="mailto:gwilliams@plantcitygov.com">gwilliams@plantcitygov.com</a>
<b>Services</b>	Recruitment of Police Chief (2020)		
CITY OF PARIS, TEXAS			
<b>Name</b>	Gene Anderson	<b>Title</b>	Finance Director
<b>Phone</b>	+1 (903) 784 9241	<b>Email</b>	<a href="mailto:ganderson@paristexas.gov">ganderson@paristexas.gov</a>
<b>Services</b>	Recruitment of City Manager (2020)		

### PROVIDING VALUABLE PERSPECTIVES FROM CURRENT CLIENTS

*At Baker Tilly, relationships matter. Our Value Architects™ have a record of successfully enhancing and protecting similar clients' value – resulting in experience-based insights for Hidalgo County.*

## Providing similar services to clients

Below is a partial list of relevant public sector executive recruitments delivered by the Baker Tilly team since 2017.

LIST OF RELEVANT PROJECTS: 2017 TO PRESENT			
Year	Client	State	Project
Current	Corpus Christi	TX	City Auditor
Current	Fargo	ND	Finance Director
Current	Fulton County	GA	Chief Assessor
Current	North Branch	MN	Finance Director (Partial)
Current	Port St. Lucie	FL	Treasurer
Current	Pueblo	CO	Finance Director
Current	Stafford County Public Schools	VA	Finance Director
2022	Dakota County	MN	Director of Enterprise Finance and Information Services
2022	Port St. Lucie	FL	Finance Director
2021	Blaine	MN	Deputy Finance Director
2021	Edina	MN	Finance Director
2021	Evansville	WI	City Administrator/Finance Director
2021	Horace	ND	Finance Director
2021	Hugo	MN	Finance Director
2021	Middleburg	VA	Finance Director
2021	Oakdale	MN	Finance Director
2021	Poquoson	VA	Finance Director
2021	Richland County	SC	County Assessor
2021	St. Paul School District (ISD 625)	MN	Controller (partial)
2020	Brooklyn Center	MN	Director of Fiscal Services
2020	Gainesville	FL	City Auditor
2020	Gloucester County	VA	Chief Financial Officer
2020	Gloucester County	VA	County Assessor
2020	Lake Elmo	MN	Finance Director
2020	League of Minnesota Cities	MN	Assistant Finance Director
2020	Middleburg	VA	Town Treasurer/Director of Finance
2020	Orange County	NC	Director of Asset Management
2020	Robbinsdale Area Schools (ISD 281)	MN	Finance Director
2020	Shakopee Public Utilities Commission	MN	Director of Finance and Administration
2019	Cincinnati Metropolitan Housing Authority	OH	Director of Revenue
2019	Olathe	KS	Internal City Auditor
2019	Stafford County	VA	Chief Financial Officer
2018	Avondale	AZ	Director of Finance and Budget
2018	Dunn County	WI	Chief Financial Officer/County Auditor
2018	Greene County	NC	Finance Director
2018	Metropolitan Council	MN	Director of Internal Audit

**LIST OF RELEVANT PROJECTS: 2017 TO PRESENT**

Year	Client	State	Project
2018	Northeast Metropolitan Intermediate School District No. 0916	MN	Director of Finance
2017	Albemarle County	VA	Finance Director (Partial)
2017	Allegan County	MI	Executive Director of Finance
2017	Culpeper	VA	Finance Director
2017	Norfolk	VA	City Assessor
2017	Raleigh	NC	Budget Director
2017	Salina	KS	Director of Finance
2017	Virginia Railway Express (VRE)	VA	Chief Financial Officer

# Value for fees

*Value means more than simply checking boxes and meeting your requirements. Value means services that lead to meaningful insights and that give Hidalgo County and your stakeholders peace of mind.*

## Delivering a professional fee estimate for Hidalgo County

We are excited about the opportunity to work with Hidalgo County and have prepared the below fee estimate to meet the County's needs and objectives. Our fees allow for thorough and insightful advice from experienced professionals without unnecessary add-on or startup charges.

The all-inclusive professional fee includes the cost of professional services by the project team leader, the project support staff and all project-related expenses such as advertising, preparation of the recruitment brochure, printing, candidate background, reference and academic verification checks and travel expenses for on-site visits. Baker Tilly is not responsible for candidates travel expenses for travel to client location for on-site interviews. Clients generally handle these matters directly with the finalists.

Baker Tilly will bill for this engagement in four installments: 30% upon execution of this agreement, 30% at Phase I, 30% at Phase II; and 10% upon acceptance of an employment offer by the finalist. The fee is not contingent. If you terminate this engagement before completion, Baker Tilly shall invoice the County for any unpaid portion of the fee.

Feel free to direct all questions regarding the professional fee and project-related expenses to Edward Williams via email at [edward.williams@bakertilly.com](mailto:edward.williams@bakertilly.com) or via phone at +1 (214) 608 6363.

### PROPOSED SERVICES

#### **Phase I**

**Task 1** – Project kickoff; candidate profile; development of marketing, recruitment and outreach strategy

**Task 2** – Acknowledge applications and begin reviewing and classification of all applicants

#### **Phase II**

**Task 3** – Develop and assign Due Diligence Questionnaire, Applicant Questionnaire, One-Way Video Interview questions (customized to each search); review responses; prepare electronic Semi-Finalist Report for client evaluation and selection of potential finalists

**Task 4** – Secure up to ten references; conduct background check that includes, but is not limited to consumer credit, bankruptcy, city/county (criminal), state district superior court, city/county (civil litigation), state district superior court (civil litigation), judgments/tax liens, federal district (criminal), motor vehicle driving record, federal district (civil litigation), academic credentials verification, professional certification verification, social security, sex offender registry, etc.; administer leadership/management assessment, Finalist Report, (resumes, cover letter, Due Diligence Questionnaire, Candidate Questionnaire Response, Reference Report, media presence and social media check report)

#### **Phase III**

**Task 5** – Interview process preparation, invitations, technical support, suggested interview questions; final process/on-site interviews with finalists

**Conclusion**

Assistance and technical support for total rewards (salary and benefits), employment offer negotiation, offer and acceptance by finalist

<b>TOTAL ALL-INCLUSIVE FEE*</b>	<b>\$26,950</b>
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\* **BAKER TILLY MAY CONSIDER A PROFESSIONAL FEE REDUCTION BY 10% FOR SUBSEQUENT RECRUITMENTS**  
*not to exceed 25% of the proposed cost on any single search during the subsequent 12-month period.*

<b>OPTIONAL SERVICES FOR CONSIDERATION</b>	<b>FEE</b>
On rare occasions, a client desires the delivery of additional search related services from the Baker Tilly executive search team. Services not included in the proposed scope of services include additional visits by the project team leader to your organization. Baker Tilly will bill Hidalgo County at an hourly rate of \$220, plus expenses for additional work specifically requested by your organization that is outside of the scope of this project or as described in the proposed scope. Prior to beginning these services, Baker Tilly will prepare and submit a written explanation of the additional services requested and the estimated number of hours required prior to commencing any additional services.	\$220 per hour plus expenses

**Negotiations**

If selected, we will provide Hidalgo County with our standard engagement terms. Should the County wish to provide alternate terms or proceed on the basis of its own format agreement, we would require the ability to negotiate mutually acceptable terms and conditions prior to executing a final contract.

# Prioritizing diversity and inclusion

*Baker Tilly is not only committed to helping Hidalgo County achieve its MBE/WBE goals. We also actively promote a diverse and inclusive workplace culture dedicated to providing opportunity for all. Diversity, inclusion and belonging are **who we are**, rather than **what we do**.*

## A firm culture committed to diversity, inclusion and belonging

Creating an environment where all team members are valued empowers us to bring our authentic selves to work each day. **When our contributions reflect our individual best, we achieve better results for Hidalgo County.**

Belonging is a core Baker Tilly value. We foster a deep level of mutual respect where each one of us feels seen, heard, valued, and connected. Each team member commits to upholding a diverse and inclusive workplace driven by fairness, compassion, and equality.

Throughout the firm, you will find our DIBS philosophy and practices embedded into everything we do. We hire people who bring new perspectives and experiences. We embrace our differences and believe a more open, connected world serves everyone better. DIBS is the lens that helps us see things more broadly and lights the path for us to follow. This benefits our people, our clients and our communities.

Shane Lloyd, Baker Tilly's new diversity lead, will help us take our [diversity, inclusion and belonging for success \(DIBS\) strategy](#) to the next level, Shane is already gathering perspectives from team members from coast to coast and digging into the deep conversations.



### DIBS steering committee

Baker Tilly's national DIBS steering committee is designed to strengthen our firm's culture of diversity, inclusion and belonging. A cross-section of leaders across the firm oversees our strategy – from inclusion-related communications to accountability measures for our key diversity goals and coordination of our signature initiatives described on the following page.



*Click the video above to see how Baker Tilly celebrates and values the identities, perspectives and contributions of every team member across our firm*



### Growth and Retention of Women (GROW)



Through our GROW initiative, Baker Tilly provides women valuable opportunities to network, share their stories, acquire skills, strengthen professional relationships and advance in their careers. Our commitment to GROW increases the number of women in management positions, enhances the retention of

women at all firm levels, creates an environment where women feel empowered and supports our advocacy of advancing women in business. It also helps us share knowledge gained with clients and creates a workforce that reflects our client base.

### *Supporting Opportunity, Advancement and Retention for all (SOAR)*



SOAR focuses on improving inclusion and increasing retention of team members of color to create a more inclusive, innovative and productive workforce. Diversity makes each of our professionals unique; inclusion is how that unique team collaborates to achieve common goals. Our SOAR strategy rests on four key pillars: talent acquisition, advancement, education, awareness and recognition.

### *NexGen: joining workforce generations*



Today, four generations coexist in the workplace – baby boomers, Gen X, millennials and Gen Z – and each brings unique viewpoints influenced by events and experiences in their lifetime. With NexGen, we aim to empower the next generation of team members to

collaboratively engage in the firm's progress while promoting an overall investment in our future. Key components of NexGen's vision involve discovering how different generations can build rewarding professional relationships that are mutually beneficial. NexGen amplifies the voices of our firm's next generation of professionals – providing leadership and growth opportunities along the way.

### *PRIDE team member network*



Our PRIDE team member network exists to support the LGBTQ+ community and their allies within Baker Tilly. We strive to create an open environment centered on LGBTQ+ issues and topics relevant to the workplace. We also acknowledge this effort includes the involvement, support, understanding and acceptance from colleagues across the firm.

### *Racial Equity Action Plan (ACTION) and focus on social justice*



Our firm developed an ACTION plan to support our strategic goal of increasing the retention of team members of color, and to create positive change in our communities and our profession. As initial steps in our plan, we convened our DIBS steering committee and formed a racial equity advisory group consisting of a diverse group of team members. We then worked closely with a highly respected consulting firm with more than 30 years of experience to assess the current state of our workplace as it relates to diversity, inclusion and racial equity. We used their recommendations to refine our DIBS strategic plan and inform the next steps in our journey.

This past year, Baker Tilly team members have taken the time to have difficult conversations and reflect deeply. Colleagues shared stories of how racism and discrimination affect their daily lives – stories they did not feel comfortable sharing before. Others gained new insight into their own unconscious biases and the steps needed to overcome them. As a firm, we are committed to continue this learning journey and achieve tangible results together.

*Baker Tilly Foundation support for racial justice advocacy*



As a firm, we have made our position clear: we stand against racism and discrimination in any form. The Baker Tilly Foundation’s board of directors, with input from our team members, recently selected key racial justice organizations as recipients of direct financial support from our firm – with a commitment to match team member donations. Additionally, our SOAR committees support local social justice causes through event sponsorship, fundraising initiatives and volunteer engagement.

*Setting the tone from the top: CEO Action for Diversity & Inclusion*

**CEO ACT!ON FOR  
DIVERSITY & INCLUSION**

Baker Tilly is a member of [CEO Action for Diversity & Inclusion](#), a steering committee of CEOs focused on making diversity and inclusion a business priority. CEO Action for Diversity & Inclusion is the most extensive alliance of business leaders openly committed to sharing successful diversity initiatives and lessons learned. This corporate exchange provides a central hub for participating businesses to share successes and challenges. As a member, Baker Tilly pledges to:

- Make our workplaces trusting places to have open conversations about diversity and inclusion
- Implement and expand unconscious bias education
- Share best, and unsuccessful, practices



*We do not view diversity, inclusion and belonging as a program or something we “have to do.” We genuinely believe this is who we are. This includes the way we recruit, how we develop and promote team members, how we serve clients and how we treat each other. This is not easy to do. It is much easier to roll out a program as “evidence” of our commitment. However, we are not interested in scratching the surface. We want to effect change for the long run – in our firm and in our profession.*

*Baker Tilly CEO, Alan Whitman*



## **Appendix I: Sample brochure**

*The County's handpicked engagement team members  
have provided similar services to many organizations.*



# DIRECTOR OF FINANCE

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THE CITY OF PORT ST. LUCIE, FLORIDA



PUBLIC SECTOR EXECUTIVE RECRUITMENT

## THE COMMUNITY

The City of Port St. Lucie, with a population of more than 200,000 residents, is located in the heart of Florida's Treasure Coast. As the 7th largest city in Florida and 3rd largest city in South Florida, Port St. Lucie offers the amenities of a big city with the comforts of a familiar hometown. The City occupies an area of 120 square miles in St. Lucie County, about 50 miles north of West Palm Beach, halfway between Miami and Orlando. Both I-95 and Florida's Turnpike are easily accessible and five major airports and four major cruise ports lie within a few hours.

Average temperatures in Port St. Lucie range from 64 degrees in February to 82 degrees in August, making the city and surrounding area a tourist destination and a nature lover's paradise. The attractive environment and top-rated park system stand out in southeast Florida, and the St. Lucie River, top-rated golf courses, and growing arts and performance community are key reasons for the city's growth in recent years.

Golf enthusiasts will find award-winning golf courses, including the one-of-a-kind PGA Village, which includes a Historical Center that documents golf's history. In all, St. Lucie County has more than 300 holes of championship golf. Baseball fans can enjoy America's favorite pastime at Clover Park - spring training home of the New York Mets and summer home of the minor league St. Lucie Mets.

Residents and visitors enjoy the raw nature of the area, which St. Lucie's City and County governments and citizens are dedicated to protecting. Take a nap on the area's nearly 21 miles of unspoiled beaches, dive among shipwrecks, paddle through lush rivers, or head offshore to snag trophy-sized sailfish, tuna, swordfish, and wahoo.

Savannas Preserve State Park offers opportunities for nature observation and recreation, such as swimming, kayaking, riding horses, bird watching, boating, picnicking, and camping. The Park's environmental educational center offers opportunities to study a large number of exotic birds, and local wildlife (such as reptiles, dolphins, manatees, and other marine life). Discover abundant marine life in the Indian River Lagoon, home to over 4,000 species of plants and animals and the most biologically diverse estuary in the country. The area also boasts Port St. Lucie Botanical Gardens and the Heathcote Botanical Gardens in Fort Pierce, which exhibits the largest public display of tropical bonsai trees in the United States.

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## THE COMMUNITY *(CONTINUED)*

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Port St. Lucie attracts a vibrant mix of people because of its low crime rate, a variety of housing stock, and abundant open space. The City has one of the highest homeownership rates in the nation. This growing community, the City offers diverse economic opportunities, clear guidelines for prosperous and sustainable growth, and state-of-the-art infrastructure ready to support development and investment.

There are traditional suburban neighborhoods and new mixed-use neighborhoods with a variety of housing types in walking distance to retail and dining establishments. The beginning stages of a downtown that will integrate urban commercial development with outdoor nature trails, waterways, and social opportunities. The City offers affordable housing with a median household income of \$60,587 and an average home value of \$240,400.

Port St. Lucie has received numerous accolades in recent years. In 2021, the City was named a Tree City USA and received a Growth Award from the Arbor Day Foundation; ranked #3 best place to retire in the U.S. by the U.S. News and World Report; named the 6th largest city where more young residents are buying homes, and ranked the 20th safest U.S. city to raise a child. The City has been named one of the Best Places to work in St. Lucie County 13 times and received the Voice of the People Award for Community Engagement twice.

Port St. Lucie is a great place to raise a family. With excellent schools, and one of the best combinations of public education, higher education consortiums, and research centers in the southeastern region of the United States. In or near the City, one can find the highly regarded Indian River State College, the Smithsonian Marine Station, the Manatee Observation and Education Center, and the Harbor Branch Oceanographic Institute of Florida Atlantic University. Two key developments for the City include the Southern Grove and City Center. The City of Port St. Lucie is proud to be a hometown where people live, learn, work, play, and celebrate all of life's opportunities and dreams.

# THE ORGANIZATION

The City of Port St. Lucie, Florida operates under the Council-Manager form of local government. Citizens elect a mayor and council members, five (5) elected council members who establish policies, programs, and initiatives. The City Council also establish the long-term vision for the City. City Council members must live in the district they represent, however residents throughout the City vote for every City Council seat, no matter which district. Citizens elect the Mayor at-large in a citywide election, who can live anywhere in the City. Similar to Council member elections, all voters can vote in the mayoral election. Each Council member has one vote, including the Mayor, which spreads legislative authority equally among all five (5) members. Additionally, the City Council appoints a City Manager to lead the daily business affairs of the City, and a City Attorney who serves as the City's chief legal advisor. The City Manager, through Human Resources, hires department directors.

For the 2021-2022 Fiscal Year, the Port St. Lucie City Council approved a \$610.5 million budget, 1,238.56 Full Time Equivalent positions and a millage tax rate of 4, 8807 per thousand.

## AWARDS AND RECOGNITION

- #53 on the list of happiest City in America by WalletHub (2021).
- #31 among 2021's best-performing large Tier 2 Cities in America by the Milken Institute.
- 2021 Michael J. Roberto Award for Career Development from the Florida City County Management Association, presented to City Manager Russ Blackburn.
- 2021 Tree City USA by the Arbor Day Foundation and the 2021 Tree City Growth Award.
- #25 on the Most Livable Mid-Size City in America by SmartAsset (2020).
- America's fastest growing cities that is still affordable for homeowners – Lendedu (2020).
- 2020 Voice of the People Award for Community Engagement by the National Research Center at Polco and the International City & County Management Association.
- Innovation in Health Award from the Florida Recreation & Parks Association (2020).
- Florida Transportation Builders' Association (FTBA) Award for Best in Construction for a Local Agency Program (LAP) Project; the Engineering News Record (ENR) Southeast's Best Highway Bridge Project; and the outstanding
- Design-Build Project by the American Council of Engineering Companies of Florida & the Florida Department of Transportation for the Crosstown Parkway Extension Project.
- Florida Animal Control Association of the Year Award, Port St. Lucie's Animal Control Division.
- More than twelve (12) Communications awards by local, state, and national associations in 2021.



## THE FINANCE DEPARTMENT

The Finance Department is committed to providing timely, concise, accurate, clear, and complete information and support to all City departments, citizens, vendors and the community at large. As such, the FMD is a trusted partner on topics requiring economic, financial, and fiduciary inputs and expertise, the Financial Management Department manages accounting and financial reporting, budget preparation, tax, payroll, debt and investment administration, treasury and internal banking, procurement, grants, and external audit.

## THE FINANCE DIRECTOR

The Finance Director leads a team of highly skilled financial services professionals, while effectively, efficiently and responsibly managing the City's finances, including planning and analysis, budgeting, financial/accounting record keeping and reporting, decision support and analysis, and assessment and management of financial risks and emerging trends. Additionally, the Finance Director is responsible for the department's strategic planning, metric and data analysis, safety and risk management, procurement, and policy development governing the above. Has ultimate responsibility for all fiscal functions of the City and serves as a key member of the executive leadership team.

The individual selected will have a genuine desire to serve the community of Port St. Lucie by providing the highest possible level of service efficiency, responsiveness, and customer service. The Finance Director works collaboratively with key stakeholders in the region to ensure alignment in areas of shared interest.

## MISSION

"To provide Exceptional Municipal Services that are Responsive to our Community while Planning for Smart and Balanced Growth that is managed in a Financially Responsible Manner."

## VISION

Port St. Lucie has Great Neighborhoods; excellent Educational Opportunities for lifelong learning; a Diverse Local Economy and Employment options; Convenient Transportation; unique Natural Resources including the St. Lucie River; and Leisure Opportunities for an Active Lifestyle. "Port St. Lucie is a Safe, Beautiful and Prosperous City for All People – Your Hometown"

## STRATEGIC GOALS

Safe, Clean & Beautiful Vibrant Neighborhoods  
Quality Education for All Residents  
Diverse Economy & Employment Opportunities  
High Quality Infrastructure & Facilities  
Culture, Nature & Fun Activities  
High Performing City Government Organization



## OPPORTUNITIES FOR THE NEW DIRECTOR:

- **Enhance the use of technology:** Specifically, the City's Enterprise Resource Planning (ERP) financial system software to more efficiently, effectively, and timely provide exceptional customer service. While the director leads this initiative (in conjunction with the Information Technology Department), this opportunity requires the input, contribution and support of all departments, and numerous City staff.
- **Strengthen citywide internal control systems:** This opportunity includes cash handling, billing, receiving, payroll, disbursements, and financial reporting.
- **Staff Training and Development:** The City expects the new director to lead a departmental initiative to continue the development, competence, skills and overall abilities of staff who uses the ERP system and those involved in the City's internal control processes.



## DESIRED KNOWLEDGE, SKILLS, AND CAPABILITIES

- Expert knowledge of governmental accounting, budgeting and finance.
- Thorough knowledge of investment programs, debt management, sales tax, and budget management.
- Knowledge of practices and principles of business management.
- Knowledge and experience in financial trend forecasting, rate modeling, and strategic financial analysis.
- Knowledge of public policy development and administration.
- Ability to develop and implement complex systems and process across the entire City organization.
- Critical, analytical and systems thinking that connects the dots in informative ways to identify trends and emerging issues for consideration.
- Ability to evaluate develop appropriate solutions with minimal financial risk.
- General understanding of laws relating to the role of Director of Finance.
- Excellent people skills and the ability to foster collaborative working relationships among internal and external customers.
- Demonstrated cultural competence to effectively interact, work, and develop meaningful relationships with people of various cultural backgrounds.
- Ability to balance confidence and humility.
- Experience building teams, implementing processes and practices in an emerging leading-edge community.
- Demonstrated capability to anticipating, adapt and innovate.

## EDUCATION AND EXPERIENCE

A bachelor's degree, from an accredited college or university, in Finance, Business Administration, Public Administration or closely related field, a minimum of eight (8) years municipal finance professional experience, of which five (5) must have been at the division manager, assistant or deputy director, director of finance or a closely related role, required. A master's degree and credentials as a Certified Public Accountant preferred.

## COMPENSATION AND BENEFITS

The City of Port St. Lucie, offers a competitive salary in the \$135,000 - \$150,000/year range. Additionally, the city offers a comprehensive benefits package that includes medical, dental, vision, basic life insurance, short- and long-term disability insurance. Additionally, the City of Port St. Lucie offers other a wide array of benefits designed to meet the diverse needs of its workforce. Benefits include paid time off, twelve (12) holidays per year, three (3) personal days per year, five (5) comp days, eight (8) hours sick leave per month, basic life insurance, short and long term disability, and ADD insurance. Additionally, the City also contributes an amount equal to 12% of an eligible employee's biweekly earnings into a 401 (a) Defined Contribution Plan. Employee required contribution is 3%. Optional benefits may include tuition reimbursement, flexible spending account, wellness program, Health Reimbursement Account, Employee Assistance Plan, supplemental life insurance, and legal insurance.



## APPLICATION AND SELECTION PROCESS

We invite qualified professionals to visit the Baker Tilly Application Portal, review the details of this career opportunity, create a profile, apply, and allow us the privilege of reviewing your credentials and considering your qualifications for this position:

<https://bakertilly.recruitmenthome.com/postings/3297>

Application review begins on **Monday, January 31, 2022**. Following the first review date, a recruitment consultant will evaluate all applications against the posted qualifications, and may extend invitations to submit additional information, including due diligence questionnaire, written questionnaire, references, and a formal interview (virtual or in-person) to a select few. This announcement will remain posted, and we will continue to accept applications, until the city reaches an agreement with a finalist. For more information, please email [edward.williams@bakertilly.com](mailto:edward.williams@bakertilly.com) or call (214) 842-6478.

**The City of Port St. Lucie is an Equal Opportunity Employer.**



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## **Appendix II: Resumes**

*The County's handpicked engagement team members  
are well-versed and experienced specialists.*

**DIRECTOR**

# Edward G. Williams, Ph.D.

*Edward Williams co-leads Baker Tilly's public sector executive recruitment team and brings character, competence and expertise to every project.*



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## Education

Bachelor of Arts, education  
University of Missouri  
(Kansas City, Missouri)

Master of Higher Education  
Administration  
University of Missouri  
(Kansas City, Missouri)

Ph.D., Educational Leadership and  
Policy Analysis  
University of Missouri  
(Kansas City, Missouri)

## Languages

English  
Spanish

Edward has more than 20 years of collective experience in human resources and organizational development at various levels, and across various disciplines including state and local government, community and educational institutions.

## Specific experience

- Human resources executive (municipal and state government)
- Executive recruitment, employee development, benefits administration, strategic planning, Performance management, market compensation studies, workforce planning, recognition programs and process improvement

## Industry involvement

- Society for Human Resources (SHRM)
- Institute for Management Studies (IMS), advisory board
- Texas Municipal Human Resources Administration (TMHRA)

## Community involvement

- Ft. Bend Habitat for Humanity, president, vice-president, secretary and member, board of (2014-2019)
- AAU basketball coach – middle school boys

## Continuing professional education

- Institute for Management Studies - Houston
- International Personnel Management Association

## DIRECTOR

# Art Davis

*Art Davis, a director with Baker Tilly, has pursued his passion to improve local government and create great communities for more than 30 years.*



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[art.davis@bakertilly.com](mailto:art.davis@bakertilly.com)

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### **Education**

Bachelor of Arts in political  
science and public administration  
William Jewell College (Liberty,  
Missouri)

Master of Public Administration  
University of Kansas (Lawrence,  
Kansas)

Art specializes in providing executive recruitment and organizational management consulting services for cities, counties, and not-for-profits.

### **Specific experience**

- Successfully launched and expanded his own local government consulting firm over the course of 10 years
- Nearly 15 years' experience in executive recruitment
- Community leadership program facilitation
- Leadership and management development
- Strategic goal setting and strategic planning facilitation
- Organizational assessment, design and development
- Organization and community facilitation
- Served more than six years as associate director for the Civic Council of Greater Kansas City, a nonprofit, 501c4 membership organization comprised of CEOs representing some of the largest companies in the region
- Coordinated and organized a strategic and master planning process (and an update of the plan after four years) focused on re-developing downtown Kansas City, involving hundreds of stakeholders
- Served nearly six years as city administrator for Lee's Summit, Missouri and in other local government positions in Kansas
- Served as assistant to the Mayor of Dallas, Texas
- Led and participated in a wide variety of community initiatives; served on a major hospital board for 13 years and on other not-for-profit boards
- Presented with the L.P. Cookingham Award by the Greater Kansas City Chapter of the American Society for Public Administration, recognizing his long-term and outstanding contributions in the field of public administration

### **Industry involvement**

- International City/County Management (ICMA), member since 1984

## DIRECTOR

# Patricia Heminover

*Patty Heminover, a director with Baker Tilly, has more than 20 years of experience in local government.*



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### **Education**

Bachelor of Science, consumer science, business administration  
Minnesota State University – Mankato

Mini MBA Program, human resources management  
University of Saint Thomas (Saint Paul, Minnesota)

Master of Education, administration  
Minnesota State University – Mankato

Patty has been with the firm since 2010. Prior to joining Baker Tilly, she was a superintendent, assistant superintendent, director of human resources and director of finance. She brings considerable experience identifying management talent, leading organizational and process improvements, and developing and administering budgets.

### **Specific experience**

- Executive Recruitment, employee development, benefits administration, strategic planning, performance management, market compensation studies, workforce planning, recognition programs and process improvement
- Experience identifying management talent, leading organization and process improvements, and developing and administering budgets
- Understanding of human resources and finance
- Experience working with governing boards
- Served as superintendent, co-superintendent of schools, director of human resources and finance, director of human resources and business services for two Minnesota school districts
- Facilitated discussions with legislators at the state level regarding education funding, securing new funding for a Minnesota school district

### **Industry involvement**

- Minnesota Association of School Administrators (MASA)
- American Association of School Administrators (AASA)
- Minnesota Association of School Business Officials (MASBO)
- River Heights Chamber of Commerce, member
- State Negotiators Association, Minnesota School Board Association
- Patty has received a School Finance Award, technology leadership awards and helped establish the first K-12 International Baccalaureate School District in Minnesota

### **Continuing professional education**

- Human Resource Certificate, University of St. Thomas
- Superintendents Licensure, State of Minnesota

**DIRECTOR**

# Sharon G. Klumpp

*Sharon Klumpp, a director with Baker Tilly, has worked on behalf of local governments for more than 35 years and partnered with them to build strong organizations.*



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## Education

Bachelor of Arts, political science  
Miami University  
(Oxford, Ohio)

Master of Public Administration  
University of Kansas  
(Lawrence, Kansas)

Sharon specializes in providing executive recruitment, organizational management and facilitation services to local governments and nonprofits.

## Specific experience

- More than 15 years' experience in executive search and organizational management consulting
- Served as associate executive director for the League of Minnesota Cities
- Appointed executive director of the Metropolitan Council, a seven-county regional planning agency for the Minneapolis-Saint Paul metropolitan area
- Served as city administrator in Oakdale, Minnesota and assistant city manager for St. Louis Park Minnesota and Saginaw, Michigan
- Private sector experience includes serving as the chief administrative officer for the Minneapolis office of a major global engineering and design firm
- Served as an adjunct instructor at Walden University, teaching public administration and organizational change in the University's School of Management

## Industry involvement

- International City/County Management Association (ICMA)

**DIRECTOR**

# Anne Lewis

Anne Lewis co-leads Baker Tilly's public sector executive recruitment team and brings nearly 20 years of local management experience.



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## Education

Bachelor of Science, business administration and management  
Shenandoah University  
(Winchester, Virginia)

Master of Science, organizational leadership and public administration  
Shenandoah University  
(Winchester, Virginia)

Prior to joining Baker Tilly, Anne served as an assistant county administrator for a Virginia county, a deputy city manager and an assistant city manager for two Virginia cities. Over the last 17 years, her experience in local government has also included positions as an emergency management deputy director, public information officer, human resources manager, parking authority executive director, housing director, transit director and convention and visitors bureau executive director. She also has had responsibility for parks, recreation and community services, information technology, animal services, general services and legislative programs.

## Industry involvement

- International City/County Management Association, Credentialed Manager (ICMA)
  - Task force on recruitment guidelines handbook
  - Task force on women in the profession
  - Task force on internship guidelines
- Government Finance Officers Association (GFOA)
- Virginia Local Government Management Association (VLGMA), former member of executive board
- Virginia women leading government

## Community involvement

- Shenandoah University Alumni Association, executive committee
- Shenandoah Apple Blossom Festival®, board of directors

## Continuing professional education

- Graduate Certificate in Public Management
- Senior Executive Institute and LEAD graduate, The Weldon Cooper Center, University of Virginia

## SENIOR RECRUITMENT ANALYST

# Cecilia Hernandez, MPA

*Cecilia Hernandez is a senior recruitment analyst with Baker Tilly's executive recruitment practice.*



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## **Education**

Bachelor of Science, public affairs  
University of Texas at Dallas  
(Richardson, Texas)

Master of Public Affairs with a  
local government concentration  
University of Texas at Dallas  
(Richardson, Texas)

## **Languages**

English  
Spanish

Cecilia is responsible for supporting the consultants throughout each recruitment process and keeps in contact with the candidates for any questions or concerns they have.

## **Specific experience**

- Communicates with and sends out candidate questionnaires to candidates once the field of applicants for a position has narrowed to a smaller group
- Responsible for creating reports used and sent to clients, submits candidates' information for background checks and verification of their education, as well as scheduling interviews for finalists
- Worked for a Texas city government as the records management clerk and provided administrative support for the city secretary department; responsibilities were extended to also provide support for the city manager and prepare for city council meetings
- Worked for a Dallas area university humanities department; worked closely with event coordinator and manager to ensure that programs and events scheduled ran smoothly; was a contact for students and provided support

**SENIOR RECRUITMENT ANALYST**

# Michelle Lopez

*Michelle Lopez, a senior recruitment analyst at Baker Tilly, has been with the firm since 2017.*



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## Education

Associate in Arts, liberal arts  
Minneapolis Community College  
(Minneapolis, Minnesota)

Bachelor of Science, project  
management (currently pursuing)  
Colorado State University – Global  
Campus

Michelle assists in the organizational management of the executive recruitment process. Along with coordinating internal workflow, she also works with clients and candidates to ensure objectives are met throughout the process.

## Specific experience

- More than 10 years of administrative support experience for multiple departments, including human resources and marketing
- Four years of experience in information technology help desk and support
- Survey and data reporting
- Reference checks for potential candidates
- Interview coordination and scheduling
- Recruitment marketing research and organization



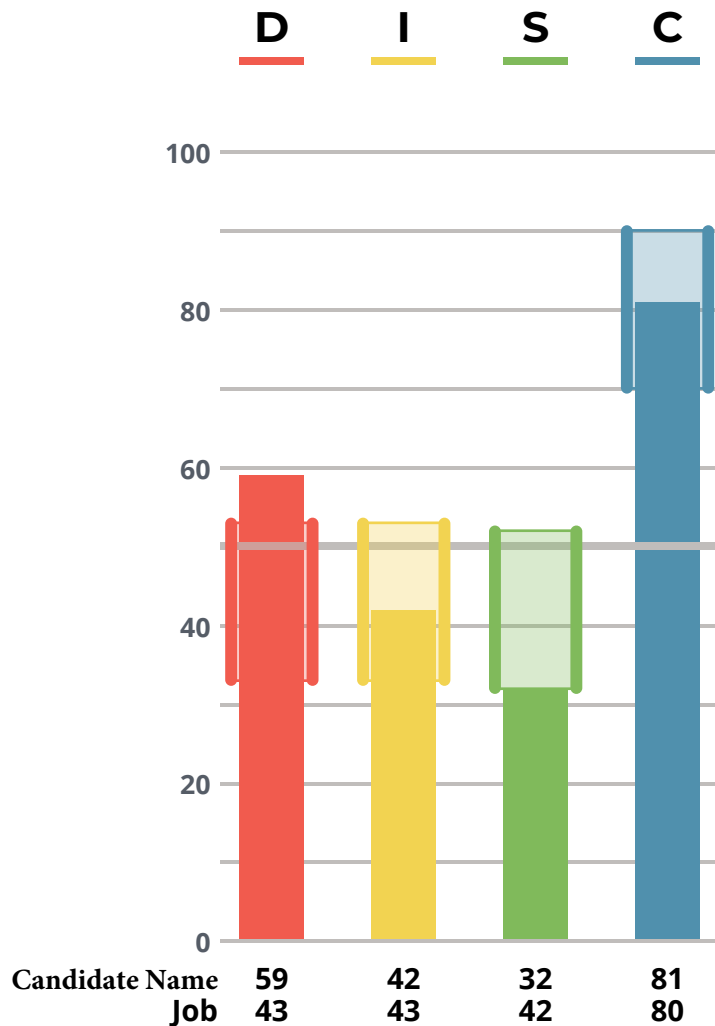
## Appendix III: Sample TTI report


# Workplace Behaviors®



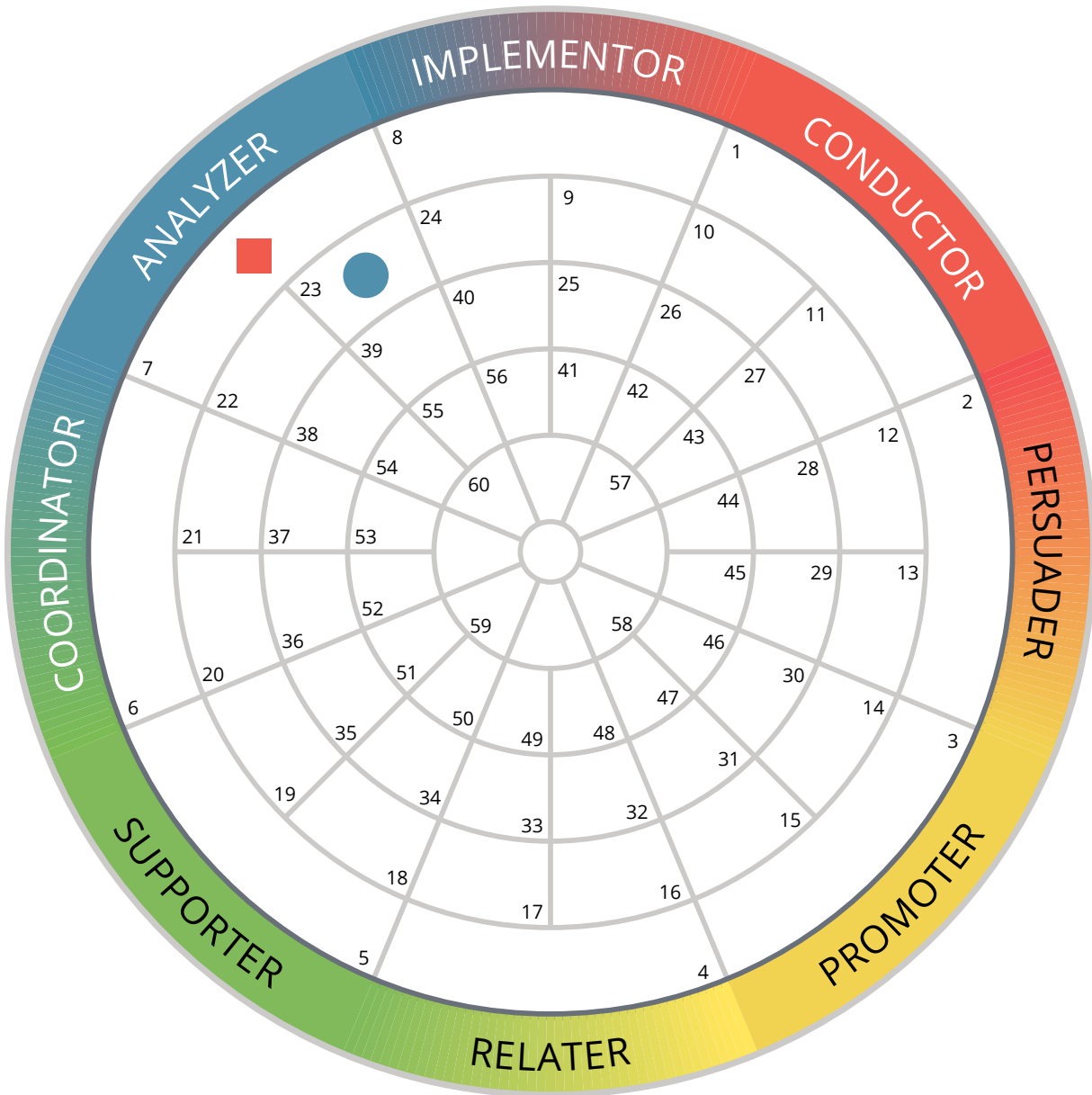
## Candidate Name

The following graph is designed as a visual comparison between the position and the applicant for each behavioral factor. The highlighted area denotes the position-related score for each behavioral factor. The applicant's score is denoted by the darker red, yellow, green and blue line. The closer the applicant's score aligns to the position's score, the better the applicant will perform in the position with respect to behavior.



 Job Range (20 point range)

# The Success Insights® Wheel










■ Job - (7) ANALYZER





● Candidate Name - (23) IMPLEMENTING ANALYZER





# Comparison Analysis






## For Consulting And Coaching



Job Competencies Hierarchy	Zone Range	Person
1. Time and Priority Management	79 — 100	62 
2. Self Starting	87 — 100	61 
3. Decision Making	94 — 100	88 
4. Personal Accountability	85 — 100	58 
5. Diplomacy	72 — 100	66 
6. Teamwork	74 — 100	67 
7. Project Management	82 — 100	69 

Primary Driving Forces Cluster	Zone Range	Person
1. Collaborative	58 — 100	46 
2. Harmonious	36 — 58	24 
3. Altruistic	35 — 59	21 
4. Structured	36 — 58	46 

Job Behavioral Hierarchy	Zone Range	Person
1. Organized Workplace	81 — 100	85 
2. Analysis	54 — 80	80 
3. Persistence	62 — 80	65 
4. Following Policy	61 — 80	70 

 Exact match     
  Fair compatibility  
 Good compatibility     
  Poor compatibility     
  Over-focused