



**CITY OF HUBER HEIGHTS
STATE OF OHIO**

City Council Work Session

October 4, 2021

6:00 P.M.

City Hall – Council Chambers – 6131 Taylorsville Road

1. **Call Meeting To Order/Roll Call**
2. **Approval of Minutes**
 - A. September 21, 2021
3. **Work Session Topics Of Discussion**
 - A. City Manager Search Firm Proposal Presentations
4. **Adjournment**

AI-7871

Topics of Discussion A.

Council Work Session

Meeting Date: 10/04/2021

City Manager Search Firm Proposal Presentations -

Submitted By: Anthony Rodgers

Department: City Council

Council Committee Review?: Council Work Session **Date(s) of Committee Review:** 10/04/2021

Audio-Visual Needs: SmartBoard **Emergency Legislation?:** No

**Motion/Ordinance/
Resolution No.:**

Agenda Item Description or Legislation Title

City Manager Search Firm Proposal Presentations

Purpose and Background

The City Council will receive presentations from representative(s) of the two City Manager search firms selected by the City Council from the five proposals received. The presentation schedule is as follows:

6:00 P.M. - Slavin Management Consultants

7:00 P.M. - BakerTilly US, LLC

The two proposals from Slavin Management Consultants and BakerTilly US, LLC are included in the meeting packet (see attached).

Fiscal Impact

Source of Funds: N/A

Cost: N/A

Recurring Cost? (Yes/No): N/A

Funds Available in Current Budget? (Yes/No): N/A

Financial Implications:

Attachments

Proposal - Slavin Management Consultants

Proposal - BakerTilly US, LLC

THE CITY OF HUBER HEIGHTS, OHIO

**Executive Search Request for Proposal
for**

City Manager

RFP 21-001-CC

Prepared by Robert E. Slavin on July 27, 2021

ORIGINAL



SLAVIN MANAGEMENT
CONSULTANTS

TABLE OF CONTENTS

TITLE PAGE	1
COVER LETTER	2
STATEMENT OF QUALIFICATIONS	3
Professional Background of Assigned Staff	4
Robert E. Slavin, President	4
David Krings, ICMA-CM (Retired), SMC Regional Manager	5
METHODOLOGY	5
Develop Position Profile	6
Identify Qualified Candidates	6
Evaluate Prospective Candidates	6
Preliminary Screening and Progress Report	6
Selection and Employment	6
In-depth Screening and Final Report	6
Establish Evaluation Criteria	7
Follow-up	7
Reporting	7
Deliverables	7
Sample of Recent SMC Chief Executive Searches	8
References	9
Guarantees	9
Proposed Time Line	10
PRICING PROPOSAL	11
Professional Fees	11
Expenses (Not-to-Exceed)	11
AGREEMENT FOR SERVICES	13

ENCLOSURES

Completed and Signed City Certification Form
Slavin Management Consultants Insurance Certificate

EXHIBITS

Sample Recruitment Profiles - Portage, MI and St. Croix County, WI
Pro Forma Invoice
Client List
EEO Statement
SMC Sexual Harassment Policy
Minority and Female Placements

TITLE PAGE

Re: Proposal for Executive Search Firm — City Manager

Firm name: Robert E. Slavin Inc. (DBA Slavin Management Consultants)

Date of submittal: July 27, 2021

Slavin Management Consultants (SMC) is most pleased to submit this proposal to conduct a comprehensive executive recruitment for the City of Huber Heights's next City Manager. Our company is exceptionally well-qualified to preform this work and we will be honored if chosen to do so.

SMC accepts all terms and conditions and requirements contained in the City's Request for Proposal as well as in the agreement that will be negotiated.

Our contact information is:

Robert E. Slavin, President
Slavin Management Consultants
3040 Holcomb Bridge Road, A1
Norcross, GA 30071
E-mail: slavin@bellsouth.net
Phone: 770.449.4656
Fax: 770.416.0848
FIN# 58-2377314

COVER LETTER

July 27, 2021

Anthony Rodgers
Clerk of the Council
6131 Taylorsville Road
Huber Heights, Ohio 45424

Via email at arodgers@hhoh.org

Re: Executive Search Firm Services - City Manager Search

Slavin Management Consultants (SMC) is pleased to submit this proposal to conduct an executive search for the next City Manager of Huber Heights. The purpose of this project is to help the City Council to develop and agree to a comprehensive position profile for City Manager and then to identify, recruit and present outstanding candidates who meet these criteria. Once the profile has been approved by the City Council, SMC will have no difficulty identifying quality prospective candidates and becoming immediately productive. It is normal for a City Manager search to take between sixty and ninety days to complete. Although, some modification to the process described in this proposal may be necessary to accommodate COVID-19, the quality of the outcome and the time line should not be affected. In fact, current COVID-19 restrictions plus the fact that Dave Krings lives in Cincinnati will cause the project expense costs to be less than described in this proposal.

SMC is a national firm, strategically based in Norcross, Georgia for easy access to Atlanta's Hartsfield - Jackson International Airport - the world's busiest airport. We have affiliates in Burlington, NC; Cincinnati, OH; Lexington, KY; Manteca, CA and Mesa, AZ.

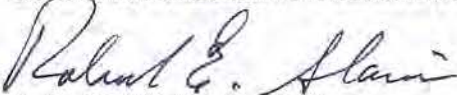
As a high quality, independent management consulting firm, Slavin Management Consultants is most capable and interested in providing these services to the City. Over the years we have recruited more than 850 local government executives including in Ohio. In Ohio, SMC has placed executives in Amberly Village, Beavercreek, Cleveland, Dayton, Glendale, the Greater Dayton Regional Transit Authority, Hamilton County, Loveland, the Metropolitan Sewer District of Greater Cincinnati, the Miami Valley County Regional Planning Commission, the Montgomery County Board for Developmental Disability Services, Oberlin, Shaker Heights, Wyoming and Tipp City.

This proposal commits the highest level of our firm's resources. Dave Krings and I will manage and serve as the primary consultants for the project. I am the owner and president of SMC and am among the most experienced recruiters of governmental managers in the nation. Dave Krings is a former County Administrator for Hamilton County as well as a previous Village Administrator for Lockland. Dave is a former International City/County Management Association President and a retired ICMA Credentialed Manager. He lives in Cincinnati. Bios for both of us are provided in this proposal.

Slavin Management has strong and proven commitment to providing exceptional recruitment services to public agencies and has received many accolades supporting this work. I have the authority to bind SMC to a contract with the City of Huber Heights.

Thank you for the opportunity to submit this proposal. We look forward to working with the City of Huber Heights on this critical and highly challenging project. If you have questions concerning this proposal, please contact me at our office at (770) 449-4656 or on my cell at (678) 296-2037.

SLAVIN MANAGEMENT CONSULTANTS



Robert E. Slavin, President

STATEMENT OF QUALIFICATIONS

Slavin Management Consultants (SMC) is an independent management consulting firm formed in 1991 and incorporated in the State of Georgia. We operate nationwide from our home office located near Atlanta at 3040 Holcomb Bridge Road, A1; Norcross, Georgia 30071. Phone: (770) 449-4656; fax: (770) 416-0848 and email: slavin@bellsouth.net.

SMC is a Georgia corporation. The principal and only stock holder of the firm is Robert E. Slavin. Mr. Slavin has extensive experience as a local government executive and as a management consultant. SMC has affiliates in Burlington, NC; Cincinnati, OH; Louisville, KY; Manteca, CA and Mesa, AZ. Over the years SMC has placed more than 850 local government executives.

SMC provides exceptionally high-quality consulting services to state and local governments, health care providers, transit authorities, utilities, special districts, and private sector clients. Specialty practice areas include executive recruitment, pay and classification, performance appraisal systems, and organization development and training. Our key consultants have conducted successful assignments for hundreds of public sector organizations nationally and offer many references as testimony of our work.

We use a "critical path" search process which allows our clients to focus attention on the selection process rather than on identifying, recruiting, screening and evaluating candidates. We understand that each client's need for key executives is different and that there is no "best" person for all situations. The best prospects are typically happily employed and not responding to advertisements. These people need to be found and encouraged to become candidates. They are understandably reluctant to apply for positions when their interest could become a matter of public information prior to being assured that the City is interested in their candidacy. Our approach to this assignment will reflect the unique qualities of Huber Heights. It will honor the interests of candidates to the extent possible under Ohio law.

In considering our proposal we point out several factors about our firm and our approach that will be of significant benefit to the City:

- We are results oriented. Once the recruitment profile is approved, we "lock" into the criteria established and carefully identify, recruit and evaluate candidates who meet **your criteria**. We do not simply bring forward candidates whom we may already know.
- Our key staff members have extensive experience in conducting executive searches for the public sector throughout the nation.
- We are committed to complete client satisfaction. Our successful placement-oriented approach will ensure that the project work is practical, realistic, timely and that it has the full commitment and support of the City so that a successful placement will be facilitated.
- We use discount airfares and leverage trips between clients whenever possible to reduce expenses to our clients.
- We are leaders in the field of executive search in the public sector and our methodologies are state-of-the-art. We can address all aspects of your assignment.
- Every search that we have conducted has resulted in a selection from our recommended group of candidates. Our experience includes large and small organizations, and chief executives and subordinate level positions. More than 95% of our placements have remained in our client's positions for more than five years.
- According to the International City/County Management Association, the average tenure of a city/county manager is approximately five years. The average tenure of local government chief executives placed by Slavin Management Consultants exceeds seven years.
- Our style is interactive. That is, we strive to build a partnership with our clients.

- We are experts in EEO/AA recruitment. Approximately 25% of our placements are women and/or minorities.
- SMC is an equal opportunity employer and recruiter, and will not discriminate against any employee or applicant for employment because of race, religion, creed, color, sex, sexual orientation, disability or national origin.

Professional Background of Assigned Staff

Along with Dave Krings, Bob Slavin will manage and serve as the primary consultants for the project. Mr. Slavin the owner and president of SMC and is among the most experienced recruiters of governmental managers in the nation. Dave Krings is a former County Administrator for Hamilton County as well as a previous Village Administrator for Lockland. Dave is a former International City/County Management Association President and a retired ICMA Credentialed Manager. He lives in Cincinnati. Both consultants have served in executive level local government positions and both are highly experienced human resources consultants. Both team members are long-term members of a variety of professional organizations and stay abreast of new and changing laws, developments and trends by regularly attending specialized workshops, seminars and annual conferences.

SMC has completed more than 850 successful executive searches for local governments and nonprofit agencies located in approximately forty-five states.

Robert E. Slavin, President

Mr. Slavin is among the best known and respected professional recruiters in the business. He is a frequent speaker before professional groups and he has written several articles for professional journals concerning governmental management. By special invitation, Mr. Slavin assisted the United States Office of Personnel Management to define and set up the Senior Executive Service for the Federal Government.

Mr. Slavin began his local government career in 1967. His experience includes twelve years working directly for local governments and it includes seven years as a principal consultant with the government search practice of Korn/Ferry International, the largest private sector search firm in the world. He headed the local government search practices for Mercer/Slavin, Incorporated, Mercer, Slavin & Nevins and Slavin, Nevins and Associates, Inc. Mr. Slavin now heads the executive search practice for Slavin Management Consultants. Clients include state and local governments, nonprofit and private sector businesses all over the United States. His experience includes search assignments for the 1984 Los Angeles Olympic's Organizing Committee.

Mr. Slavin's experience and qualifications include organizational analysis, classification and compensation studies, and assessment centers and human resource's systems studies.

Before being invited to join Korn/Ferry International, Mr. Slavin served as Assistant City Manager/Director of Human Resources for the City of Beverly Hills, California.

While at Beverly Hills, Mr. Slavin conducted many executive level recruitment assignments involving nationwide search and placement. Before joining the City of Beverly Hills, Mr. Slavin was the Assistant Personnel Director for the City of San Leandro, California.

Before San Leandro, Mr. Slavin was on the personnel staff of Santa Clara County, California. His assignments included recruitment, classification and selection for the County's Health Department, Medical Center, Transportation Agency, Sheriff's Office, Superintendent of Schools, Fire Marshall, Assessor's Office, Library System and County Recorder's Office.

Mr. Slavin received his Bachelor of Science degree in Political Science from the University of Santa Clara, and has completed the graduate course work for a Master's degree in Public Administration at California State University at Hayward. He is a Certified Professional Consultant to Management by the National Bureau of Certified Consultants.

Organizations

- International City/County Management Association
- American Society for Public Administration
- International Personnel Management Association
- IPMA - Human Relations Commission
- IPMA - Publications Review Committee
- Society for Human Resource Management
- Southern California Public Labor Relations Council
- Southern California Municipal Assistants
- Bay Area Salary Survey Committee

David Krings, ICMA-CM (Retired), SMC Regional Manager

Mr. Krings, who is based in Cincinnati, OH, has more than 45 years of experience at the top levels of State, County, and Municipal Governments. In more recent years he has served local governments throughout the United States in a consulting capacity. He is internationally recognized as a state and local government management practitioner and consultant. Dave has been on the professional staff of governors in both Wisconsin and Arkansas. He served as the County Administrator in Peoria County (Peoria) Illinois and Hamilton County (Cincinnati) Ohio. Both Hamilton County and Peoria County received national recognition for innovative, quality management during Dave's tenure. He also served as the Assistant Executive Director for Ramsey County (St. Paul) Minnesota.

In 2005, Mr. Krings began his encore career, still in public service, but in a much broader capacity than in prior years. He is the Midwest Regional Director of Slavin Management Consultants, specializing in local government management searches.

He has served as an adjunct Public Administration instructor for the University of Cincinnati and on the faculty of the University of Illinois, Community Information and Education Service.

His peers recognized his leadership by selecting him as the first person to be both the President of the International City-County Management Association (ICMA) and the President of the National Association of County Administrators (NACA). He continues to serve both organizations as an advocate for professional training and ethical behavior. He also is a former president of County Administrators Associations in Illinois and Ohio.

Dave has a M.A. in public policy and administration from the University of Wisconsin-Madison and a BA from Carroll College (Waukesha, Wisconsin). He has also studied at schools in Denmark and Mexico.

He is a recipient of an American Society for Public Administration chapter Good Government Award and is recognized by International City/County Management Association (ICMA) as a retired credentialed manager.

METHODOLOGY

We recommend a five-step process as follows:

- Define job qualifications and requirements for the City Manager position — the "recruitment profile."
- Identify and recruit qualified candidates.
- Evaluate prospective candidates.
- Make recommendations, help in selection and facilitate employment.
- Establish evaluation criteria and follow-up.

A. Develop Position Profile

We will meet with each Council member individually and, with the City Council's approval, with staff and community leaders to learn the City's needs, focus and requirements such as experience, education and training as well as preferred management style and personal traits. In developing the recruitment profile, we will spend a considerable amount of time at the beginning of the process in Huber Heights to gather information about the City and to ascertain the unique challenges of the job and the general environment within which the position functions.

Once we have gained the necessary information, we will prepare a draft recruitment profile and review it with the City Council to arrive at a general agreement regarding the specifications for the position. The final profile will include information about the region, the City of Huber Heights, the City government, major issues to be faced, the position and the selection criteria established.

B. Identify Qualified Candidates

Once we know and understand the City's criteria and expectations we will develop a targeted marketing program specifically designed to meet those expectations. SMC's recruitment methodologies are state-of-the-art and include placing advertising in professional publications and on professional websites, outreach networking using professional association and social media websites and the use of SMC's large resume data base. SMC will acknowledge all resumes received and will carefully screen all applicants.

C. Evaluate Prospective Candidates

Preliminary Screening and Progress Report

Criteria for the preliminary screening will be contained in the approved recruitment profile. They will include such items as education, technical knowledge, experience, accomplishments, management style, personal traits, etc. Screening of candidates against those criteria will be based on data contained in the resume and other data provided by the candidates and on our knowledge of the organizations in which they work. At this stage, each must meet the minimum qualifications specified in the recruitment profile.

We ask well-qualified candidates to complete a comprehensive supplemental questionnaire that is specifically tailored to the City's profile. Through this written instrument, candidates provide substantial information about their career interests and accomplishments, their leadership and management philosophy and style, reasons for job changes, their future career aspirations, etc.

We will meet with the City Council to provide a progress report on a number of semifinalist candidates. These individuals will be top prospects who clearly meet the City's specifications for the position. With guidance from the City, we will narrow the semifinalist candidate group on the basis of refined criteria. During this meeting we will determine the City Council's expectations relative to the components and scheduling of the final candidate interview process.

D. Selection and Employment

In-depth Screening and Final Report

At this point, we will interview those semifinalist candidates whom the City Council has the greatest interest in. Proper "fit" is as important as technical ability. We assess both. In order to best assess candidates' management style and interpersonal characteristics, we personally interview each in his or her present work environment. We will closely examine each candidate's experience, qualifications, achievements, management style and interpersonal skills in view of the selection criteria and our professional expertise in evaluating the quality of such qualifications, skills and achievements.

We conduct in-depth background checks on those individuals who continue to demonstrate their overall suitability for the position. Included are detailed and extensive reference checks which cover a minimum period of ten years. In conducting these, it is our practice to speak directly to individuals who are now or have been in positions to evaluate the candidate's job performance. We ask each candidate to provide us with a large number of references. We then network these references to other persons who know the candidate. In this way, we thoroughly evaluate each candidate. These references and evaluations are combined to provide frank and objective appraisals of the top candidates.

As part of our evaluation process we conduct credit checks and verify undergraduate and graduate college degrees. We also conduct internet and criminal, civil and driving court records checks. At the City's option, we can psychological (or similar) testing of the candidates. This optional item will result in extra cost.

We will then meet with the City Council to present a group of well-qualified finalist candidates for interviews in Huber Heights. These final candidates will not be ranked because, at this point, they will all be qualified and it will then be a matter of chemistry between the candidates and the City Council that should produce the final selection decision.

Our final report will be presented in a meeting with the City Council. This written report is a comprehensive document. It contains our candidate recommendations, details about the search, interview tips, interview questions, candidate evaluation forms and information about legal vs. illegal inquiries. The report also includes the candidate interview schedule as well as our recommendations relative to timing, sequencing, location, setting, format, and conduct of interviews. The report contains comprehensive information about each recommended candidate. This includes educational and experience information, an evaluation of the candidate's experience relative to the criteria established by the City, a summary of reference comments and a statement of accomplishments and management style prepared by the candidate. Present compensation is also provided for each recommended candidate.

We will provide information about trends in employment, employment contracts and agreements, relocation expenses, perquisites, appropriate roles for spouses, receptions, etc. We arrange schedules for top candidate interviews with the City and we will coordinate the entire process.

We will properly handle any and all media relations. Unless otherwise directed, it is our standard practice to tell all media that we are working on behalf of the City of Huber Heights and that any public statement should come from the City directly. Under no conditions will we release information to the media unless specifically directed by the City to do so.

We will notify all unsuccessful candidates of the final decision reached. We will continue to work for the City until a suitable candidate is recruited and hired by the City.

E. Establish Evaluation Criteria

Once the new City Manager has been on board for 30 days or so, we will conduct a session with the City Council and with the new City Manager to establish mutual performance criteria and goals for the position.

F. Follow-up

We will follow-up with the City Council and the new City Manager during the first year and assist in making any adjustments that may be necessary.

G. Reporting

We will keep the City informed, involved in decisions and involved in the search process. We will provide frequent progress reports to the City.

H. Deliverables

Deliverables include the recruitment profile (draft and final), the advertisement (draft and final), the progress report (presented in person), the final report with interview tips, interview schedule, interview questions, candidate resumes, candidate evaluations, candidate writing samples, rating sheets, ranking forms, tabulation forms and appropriate/inappropriate question list and negotiated employment agreement between the City and the selected candidate.

SMC is an equal opportunity employer and recruiter and will not discriminate against any employee or applicant for employment because of race, religion, creed, color, sex, sexual orientation, disability or national origin.

I. Sample of Recent SMC Chief Executive Searches

CLIENT	POP	SEARCH FOR	STAFF ASSIGNED (Mgr/Asst)	Contact Information
Bothell, WA	46,000	City Manager	Slavin Wenbert	Mayor Andy Rheaume (206) 999-8835 andy.rheaume@bothellwa.gov
Buncombe County, NC	259,103	County Manager	2019	Brownie Newman, Board Chairman Buncombe County Administration Bldg. 200 College Street Asheville, NC 28801 (828) 243-0107 newman@buncombecounty.org
Corpus Christi, TX	285,000	City Manager	Slavin/Krings	Mayor Joe McComb (361) 826-3100 joemccomb@ccetexas.com
Dothan, AL	65,500	City Manager	Slavin/Krings	Mayor Mark Saliba (334) 615-3110 mayor@dothan.org
Evans, CO	21,400	City Manager	Slavin Wenbert	Mayor John Morris (970) 475-2209 jmorris@evanscolorado.gov
Georgetown, SC	10,000	City Administrator	Slavin	Mayor Brandon Barber, Sr. (843) 545-4002 bbarber@cogsc.com
Greenville, NC	84,500	City Manager	Slavin	Mayor P.J. Connelly (252) 329-4420 pjconnelly@greenvillenc.gov
Hardeeville, SC	5,000	City Manager	Slavin	Ms. Lori Pomarico, City Clerk Phone: (843) 784-2231 lpomarico@cityofhardeeville.com
MetroPlan Orlando	Orange, Seminole and Volusia Counties	Executive Director	2018	Jason Loschiavo, CPA Director - Finance and Administration MetroPlan Orlando (407) 481-5672 Ext. 310 jloschiavo@metroplanorlando.org
Mount Dora, FL	12,500	City Manager	Slavin	Ms. Gwen Johns City Clerk Ph: (352) 735-7126 johnsg@cityofmoundora.com
Myrtle Beach, SC	30,000	City Manager	Slavin	Mayor Brenda Bethune (843) 918-1000 bbethune@cityofmyrtlebeach.com
Ocean City, MD	7,100 to 335,000	City Manager	Slavin	Wayne Evans Human Resources Director (410) 289-8778 wevans@oceancitymd.gov
Orange Water and Sewer Authority (OWASA)	Serves Carrboro & Chapel Hill	Executive Director	Slavin/Lipscomb	Stephanie Glasgow Director of Human Resources (919) 537-4223 sglasgow@owasa.org
Portage, MI	47,000	City Manager	Slavin/Krings	Mr. Joe La Margo City Manager (269) 329-4400 boulisr@portagemi.gov

CLIENT	POP	SEARCH FOR	STAFF ASSIGNED (Mgr/Asst)	Contact Information
Shelton, WA	10,000	City Manager	Slavin	Mayor Bob Rogers (360) 490-6394 bobrogers@sheltonwa.gov
Volusia County, FL	538,700	Deputy County Manager	2019	George Recktenwald, County Manager Volusia County (386) 736-5920 grechtenwald@volusia.org

J. References

Randy Keasling

Director of Human Resources
City of Great Bend, Kansas
1209 Williams
Great Bend, Kansas 67530
(620)793-4111, ext. 234
City Manager Search (2018)
rkeasling@greatbendks.net

Tarra Davies-Fox

Human Resources Director
St. Croix County
1101 Carmichael Road
Hudson, WI 54016
(715) 377-5816
County Administrator Search (2020)
tarra.davies-fox@sccwi.gov

Randall Skender

Director of Administration
Greater Peoria Sanitary District
2322 S. Darst Street
Peoria, IL 61607
(309) 272-4802
Executive Director Search (2017)
rskender@qpsd.org

Mr. Todd E. Rent

Human Resources Director
City of Urbana
400 South Vine Street
Urbana, IL 61801
(217) 384-2451
City Administrator Search (2018)
terent@urbanainilinois.us

Joseph La Margo

City Manager
City of Portage
7900 South Westnedge Avenue
Portage, MI 49002
Phone: (269) 329-4500
City Manager Search (2018)
Email: lamargoj@portagemi.gov

Andrew Rand

Peoria County Board Chairman
Peoria County Courthouse
324 Main Street, Room 502
Peoria, Illinois 61602-1319
(309) 672-6056
County Administrator Search (2011)
arand@peoriacounty.org

K. Guarantees

SMC provides a comprehensive set of assurances and guarantees to our executive recruitment clients that include:

- We are committed to excellence. We guarantee the highest quality of work and its success in your environment. To accomplish this, we will continue to work with the City until the City is satisfied with the candidates and a satisfactory candidate is selected and accepts employment.
- We guarantee our work and will redo the search if the position is vacated, for any reason, within two years of the employment date of a candidate selected by the City through our efforts.
- We will never actively recruit any *candidate who we have placed* **nor** will we actively recruit any *employee* from a client organization for at least two years from the completion date of an assignment.

L. Proposed Time Line

The search process normally takes between sixty (60) and ninety (90) days to complete and typically follows the following pattern:

		DAYS			
STEPS		1-30	30-45	45-60	60-360
1.	DEVELOP SEARCH PROCESS, RECRUITMENT PROFILE AND ADVERTISING PROGRAM FOR CITY COUNCIL APPROVAL	✓			
2.	IDENTIFY QUALIFIED CANDIDATES, REVIEW DATA BASE, NETWORK, RECEIVE AND REVIEW RESUMES	✓	✓		
3.	SCREEN & EVALUATE PROSPECTIVE CANDIDATES		✓		
4.	PROGRESS MEETING AND REPORT		✓		
5.	INTERVIEW AND EVALUATE PROSPECTIVE CANDIDATES		✓	✓	
6.	SUBMIT FINAL REPORT AND RECOMMENDATIONS, ASSIST IN SELECTION, FACILITATE EMPLOYMENT			✓	
7.	ESTABLISH EVALUATION CRITERIA AND FOLLOW-UP				✓

Approximately twelve semifinalist candidates are presented to the City at the progress meetings. Generally, about five finalist candidates are presented for interviews with the City Council.

PRICING PROPOSAL

Professional Fees

Our fees are based on a rate schedule that reflects the experience of the individual assigned. We use a flat fee rate schedule. Therefore, there are no project limitations based on annual salary. For this assignment we are proposing to use only consultants who have specific experience on similar assignments for other clients. We will use senior consultants where appropriate and to reduce the overall cost. We will use staff consultants when feasible. The following tables show the level of involvement by project step and cost.

PROJECT COSTS					
STEPS	ASSIGNED HOURS (Approximate)			RATE (Hr)	FEES
	Project Manager	Consultant	Total		
1. Project Planning/Develop Position Profile/ Prepare Advertising	32		32	85	\$2,720
2. Identify & Recruit Candidate/Acknowledge Resumes	32		32	85	\$2,720
		35	35	35	\$1,225
3. Preliminary Candidate Screening	12		12	85	\$1,020
		8	8	35	\$280
4. Progress Report to City/Reduce Candidate Pool	8		8	85	\$680
		8	8	35	\$280
5. In-depth Candidate Evaluation (Includes on-site consultant interviews with semi-finalist candidates)	36		36	85	\$3,060
		16	16	35	\$560
6. Arrange for & Schedule Final Interviews	4		4	85	\$340
7. Prepare Final Report with Interview Questions and Selection Criteria	10		10	85	\$850
		12	12	35	\$420
8. Present Final Report and Attend Interviews	12		12	85	\$1,020
9. Assist in Employee Selection	2		2	85	\$170
10. Negotiate Employment Agreement	6		6	85	\$510
11. Establish Performance Goals	6		6	No Charge	\$0
12. Follow-up	4		4	No Charge	\$0
TOTAL HOURS	164	79	243		
TOTAL PROFESSIONAL FEE					\$15,855

Expenses (Not-to-Exceed)

Consultant Travel Costs: The client pays direct cost for all necessary consultant travel using coach or, when available, lower air rates, corporate hotel rates at moderately priced properties (Holiday Inn or equivalent), rental cars, using the corporate discount and normal meals. Our client controls these costs in the following ways: (1) when appropriate, consultants will accomplish multiple purposes when traveling and will allocate costs to multiple clients; (2) the client pre-approves all work plans including all consultant (and candidate) travel.

Office Costs Include: Telephone (\$350 flat fee, billed in two installments), FAX, postage, messenger, copier, and clerical costs.

Consultant travel, classified advertising and office costs to support the executive search project described in this proposal will not exceed \$7,500.00. Therefore, the total cost to the City for the proposed work will not exceed **\$23,355.00**.

The costs for final candidates to travel to Huber Heights for interviews are not covered by this proposal. These costs vary widely and are impossible to anticipate at the beginning of a search. Candidate travel expenses are typically paid by the City on a reimbursement basis, directly to the candidates, and controlled through the City's prior approval of the finalist candidates.

Should the City's needs result in additional project scope that significantly increases costs it may be necessary to increase the expense budget for the project.

Your liability to Slavin Management Consultants for services rendered under this agreement will not exceed the agreed upon price unless an increase is authorized by you in writing.

We will submit monthly invoices for fees and expenses. It is our practice to bill 30% at the start of the searches, 30% at the end of thirty days, 30% at the end of sixty days, and the remaining 10% shortly after the time the new City Manager accepts employment with the City. Each invoice will be payable upon receipt for professional services. SMC does not provide discounts.

Expenses will be billed in addition and shown as a separate figure. Attached is a pro-forma invoice showing the level of accounting detail we will provide.

Expenses will be billed in addition and shown as a separate figure. Attached is a pro-forma invoice showing the level of accounting detail we will provide.

We will comply with all applicable laws, rules, and regulations of federal, state, and local government entities.

Our ability to carry out the work required will be heavily dependent upon our experience in providing similar services to others, and we expect to continue such work in the future. We will, to the degree possible, preserve the confidential nature of any information received from you or developed during the work in accordance with our professional standards.

We assure you that we will devote our best efforts to carrying out this engagement. The results obtained, our recommendations, and any written material provided by us will represent our best judgment based on the information available to us. Our liability, if any, will not be greater than the amount paid to us for the services rendered.

This proposal constitutes the agreement between us. It cannot be modified except in writing by both parties. Our agreement will be interpreted according to the laws of the State of Ohio.

AGREEMENT FOR SERVICES

This proposal is presented for Slavin Management Consultants by:

SIGNATURE: Robert E. Slavin

NAME: Robert E. Slavin

TITLE: President

DATE: July 27, 2021

This proposal is accepted for the City of Huber Heights, Ohio by:

SIGNATURE: _____

NAME: _____

TITLE: _____

DATE: _____

ENCLOSURES



	Review and read the RFP document again to make sure that you have addressed all requirements. Your original response and the requested copies must be identical and be complete. The copies are provided to the evaluating staff members and will be used to score your response.
	Submit your response on time. Note all the dates and times listed in the RFP and be sure to submit all required items on time. Late proposal responses are <i>never</i> accepted.

Please Note:

All potential contractors are strongly urged to submit supporting documentation as to their qualifications to perform the Scope of Work.

Certificate of Insurance, Reference List and Timeline must be attached.

If additional comments or conditions are desired, please attach a separate sheet providing details.

Include all proposed equipment specifications; showing manufacturer name, model, etc. depicting unit specifications and other pertinent information.

Certification:

The undersigned on the Bid Proposal certifies that the Instructions to Bidder has been carefully examined, is thoroughly familiar with the terms and specifications applicable to and made part of this Request for Proposal, and understands and is capable of meeting the provisions within to the quality, type and grade of work requested. The undersigned further certifies the prices shown in the schedule of items contained within the Proposal/Bid are in accordance with the conditions, terms and specifications of the proposal and that any exception taken thereto may disqualify the bid.

Signature

Robert E. Slavin

Print Name

slavin@bellsouth.net

Email Address

Slavin Management Consultants

Company Name

July 27, 2021

Date

President

Title

(770) 449-4656

Phone



ROBEESL-01

MADAMS

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

4/27/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Siegel Insurance Inc 2987 Clairmont Rd Suite 425 Atlanta, GA 30329	CONTACT NAME:	PHONE (A/C, No, Ext): (404) 633-6332	FAX (A/C, No): (404) 633-9388
	E-MAIL ADDRESS: info@siegelinsurance.com		
INSURED Robert E Slavin, Inc d/b/a Slavin Management Consultants 3040 Holcomb Bridge Rd A1 Norcross, GA 30071-1357	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A: The Travelers Indemnity Company		25658
	INSURER B: Travelers Casualty & Surety Company		19038
	INSURER C: United States Liability Insurance Company		25895
	INSURER D:		
	INSURER E:		
INSURER F:			

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PROJECT ☐ LOC OTHER:			680-594D6811-20-42	6/1/2020	6/1/2021	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000
A	AUTOMOBILE LIABILITY ☐ ANY AUTO OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY			680-594D6811-20-42	6/1/2020	6/1/2021	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE DED ☐ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) ☐ Y/N If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	UB-1J744007-20-42	6/1/2020	6/1/2021	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Professional Liabili			SP10106340	3/2/2021	3/2/2022	PROF Liability 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

City of Corinth
3300 Corinth Parkway
Denton, TX 76208

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

EXHIBITS

The City of Portage, Michigan
invites your interest in the position of

CITY MANAGER



About Portage

Portage offers its citizens a dynamic living environment, energized and sustained quality of life.

Vibrant City, Sustained Quality

Portage has shown itself to be the municipal equal to a renewable resource. The city offers its citizens a dynamic living environment, energized and sustained by quality of life characteristics that are unmatched in the region, punctuated with great retail, and enriched by a unique pledge to share the natural environment with its citizens.

Excellent Living

Portage residents enjoy affordable housing with low taxes, safe and well-maintained neighborhoods, world-class healthcare, enriching activities and entertainment, and a unique parks system that connects citizens to each other and the natural world.

Rewarding Future

Portage has a great past and its citizens anticipate a rewarding future for their children and grandchildren. The people of Portage have a character and willingness to make our city a special place to live, work and play. The city continuously engages its citizens to address current challenges and develop a future vision for our community – and ultimately ensure the city remains *A Natural Place to Move*.



Quality of Life

More than 49,000 people call Portage home. Residents enjoy a low municipal tax rate that remains in the lower 25% of similar-sized Michigan cities. The city offers diverse and affordable housing opportunities, with steadily increasing property values. Portage has more than 55 miles of extensive bikeways and trails, connecting citizens to retail and cultural resources and bringing neighbors and neighborhoods together. World-class healthcare is delivered to Portage residents by Bronson Healthcare, Ascension Borgess and several independent medical groups.

More than 2,000 acres of park and recreational and open space are ready to be explored in Portage. The city maintains 19 parks, including Ramona Park Beach, a life-guarded public swimming area; the Celery Flats Historical Area; Overlander Bandshell; the four-mile Portage Creek Bicentennial Trail; the Ice Rink at Millennium Park, the area's only outdoor refrigerated ice rink and several neighborhood parks.



Portage Public Schools (portageps.org) educates approximately 8,700 students at eight elementary, three middle and three high schools, and an early childhood program. PPS offers several prestigious learning programs, including the International Baccalaureate program, the Kalamazoo Area Math and Science Center, Education for Employment and Education for the Arts in partnership with the Kalamazoo Regional Educational

Service Agency (kresa.org), the Academically Talented Youth Program in partnership with Western Michigan University (wmu.edu) and the Early-Middle College program in partnership with Kalamazoo Valley Community College (kvcc.edu). The Portage community approved a \$144 million bond in 2016 to include construction of two new middle schools, renovation of one middle school, athletic facilities and pools at the two high schools, technology upgrades district wide and replacement of aging school buses.

Portage owns 20 water production wells located throughout the city. The Garden Lane Water Treatment Facility removes arsenic from the groundwater before distribution to the public water system. The water is tested daily to ensure the highest quality drinking water is delivered to Portage residents. Portage utility customers enjoy affordable utility rates, which decreased in 2018 and 2019.

Business Environment

The City of Portage is strategically located halfway between Detroit and Chicago and at the crossroads of two major highways – I-94 and US 131. Its location offers convenient access to the Kalamazoo/Battle Creek International Airport and an Amtrak train station, with Metro Transit providing public transportation services. Portage serves as the economic engine of Kalamazoo County and is home to two global companies and major employers, Stryker and Pfizer (currently undergoing \$245 million and \$450 million expansion projects, respectively). The workforce in Portage is highly educated, with 43.1% of residents 25 years or older having a bachelor's degree or higher and the unemployment rate is currently 3.1%, below the state and national levels.

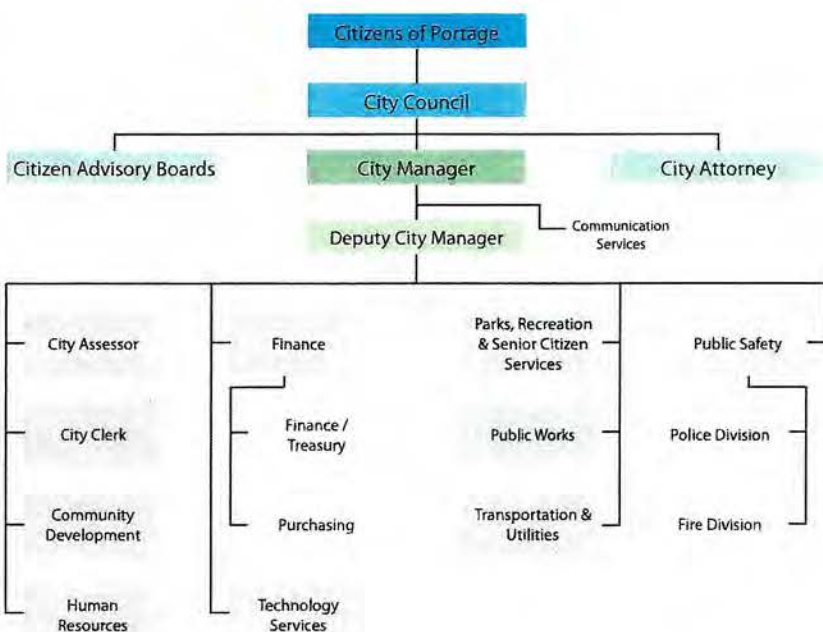


Portage offers a business-friendly environment with modern and extensive infrastructure. The city attracts new businesses, existing business expansion and innovative redevelopment projects by offering a variety of business incentives. South Westnedge Avenue, a significant retail shopping destination in the area, features The Crossroads Mall, the Southland Shopping Center and a large assortment of national and local retailers. The Lake Center District and secondary shopping nodes throughout the city offer a wide variety of shopping, dining and consumer services.

Government

Established in 1963, the City of Portage is a professional and experienced government service that operates with a Council/Manager form of government. The Mayor and Councilmembers, elected at-large, serve as the policy-making arm of the city. The City Manager is appointed by the City Council to handle the day-to-day administrative duties of the city. The City Manager makes recommendations to the City Council as a group and the Council acts on business at twice monthly meetings (usually the 2nd and 4th Tuesday of every month) at 7 PM.

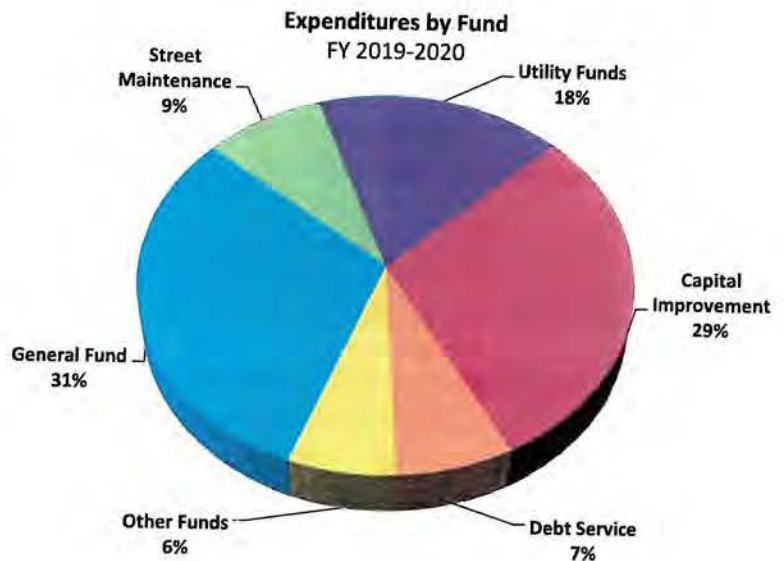
Organizational Chart



The Portage City Council consists of a Mayor and six Councilmembers (non-partisan). Councilmembers are elected to four-year terms, staggered every two years (three Councilmembers are elected every two years). The Mayor is elected every two years and is the presiding officer of the Council. The Council is responsible for adopting and amending city ordinances, determining city policies and approving contracts for goods and services. The Council also authorizes the annual city budget, which runs on a fiscal year (July 1 - June 30) and determines the city tax millage and utility rates.

The City Manager is appointed by and serves at the pleasure of the City Council. She or he advises the Council and makes recommendations on matters related to the operation of the city including the responsibility for overseeing all departments and staff. The City Manager prepares the agenda for each City Council meeting and provides the Council with all necessary documentation regarding each order of business.

The annual budget is prepared and presented to the City Council by the City Manager, along with the Capital Improvement Program, which provides the city with direction for the future. The City of Portage FY 2019-2020 budget totals approximately \$84.9 million and includes the third consecutive annual millage reduction. The city has reduced its debt from \$105.2 million in 2008 to \$55.5 million in 2019, down 47% over 11 years and Standard & Poor's reaffirmed the city's credit rating of AA+ in May 2019. With a Total Taxable Assessed Value of \$2.193 billion, Portage is the municipality with the largest tax base in Kalamazoo County.



As the administrative head of the government, the City Manager appoints all department heads. Portage provides a full array of municipal services from ten departments: City Assessor, City Clerk, Community Development, Finance & Purchasing, Human Resources, Parks, Recreation & Senior Citizen Services, Public Safety (Police & Fire), Public Works, Technology Services and Transportation & Utilities. The city employs nearly 200 full-time city employees who have an average of more than ten years of service, along with more than 53 part-time and seasonal employees. Portage employees are committed to providing exceptional customer service and attend annual customer service training and a regional diversity / inclusion presentation.



Awards & Recognitions

Year after year, the City of Portage is recognized for excellence in areas such as public safety, innovative use of technology, financial planning and budgeting, public works projects, parks and recreation programs, public communications and other areas of public service.

- » AA+ Bond Rating by Standard and Poor's in 2017 (affirmed in 2018).
- » Certificate of Achievement for Excellence in Financial Reporting from Government Finance Officers Association for the 2018 Comprehensive Annual Financial Report.
- » Distinguished Budget Presentation Award from the Government Finance Officers Association for the Fiscal Year 2018-2019 City Budget.
- » Perfect Score from the Michigan State Tax Commission for the 2018 Audit of Minimum Assessing Requirements (AMAR) Review.
- » 2017 Project of the Year Public Works for Greater than \$5 Million from the American Public Works Association Michigan Southwest Branch for the Stryker Way road construction project.
- » 2018 Surveying Merit Award from the American Council of Engineering Companies for the Local Streets Reconstruction (use of drones for surveying).
- » 2016 Innovation Idea from the American Public Works Association Midwest Region for the Snow Plow Rodeo program.
- » 2015 Award of Distinction from the Communicator Awards for MI.Portage App Mobile application.
- » 2015 Award of Distinction from the Communicator Awards for the website Media Center.
- » Accreditation from the National Institute of Senior Centers. Original accreditation received in 2011, re-accredited in 2016.
- » Accreditation from the Commission on Accreditation for Law Enforcement Agencies. Original accreditation received in 2013, re-accredited in 2015 and 2018.
- » Accreditation from the Michigan Law Enforcement Accreditation Commission in 2018.
- » Accreditation from the Commission on Fire Accreditation International in 2015.



Forward Focus - Perspectives from the Council

The following is a list of thoughts, issues and opportunities provided by the Portage City Council:

- » The City Council is seeking bold leadership with vision:
 - An individual confident to lead not only the City of Portage, but provide leadership at the county level.
 - An individual who will interface with the City Council and be a presence in the community, delegating the organizational administrative functions to the Deputy City Manager.
 - An individual with a strong background in community and economic development, with experience in revitalization of properties, commercial districts, brownfields, neighborhoods, etc.
- » The City of Portage is in sound financial condition, with a fully-funded retirement system and no "legacy" retirement or healthcare liabilities. The Council desires strong fiscal management and a plan for continued debt reduction, while maintaining the current high level of city services.
- » Notwithstanding the city's current solid tax base, as well as strength in the commercial and residential sectors, there is a need for focus on development and place-making with a view to making the city attractive and sustainable for all ages and businesses to include emphasis on:
 - Redevelopment and revitalization in certain commercial corridors. The city's indoor mall (The Crossroads) and retail corridor (South Westnedge Avenue) are experiencing challenging operating environments, consistent with the broader retail sector. Commercial property in certain markets may be underutilized and may represent opportunities for redevelopment.
 - Innovative development tools and strategies. New development opportunities may be limited as the city has fewer areas of undeveloped parcels.
 - Creation of a business-friendly, accessible environment for small and entrepreneurial businesses, both existing and new.
 - Continued diversification of the city's tax base.
 - Continued diversification of housing options. Although the cost of living is generally reasonable, housing affordability continues to be a challenge for low-income households in Portage.
 - Enhanced environmental standards in development and construction.

Mayor
Patricia Randall



Mayor Pro Tem
Jim Pearson



Councilmember
Chris Burns



Councilmember
Richard Ford



Councilmember
Lori Knapp



Councilmember
Claudette Reid



Councilmember
Terry Urban



- » The current five-year Comprehensive Plan was adopted in 2014 and requires a review and update in FY 2019-2020. The Comprehensive Plan acts as a foundation for developing and executing strategic priorities for the next five years is paramount.
- » The city has excellent parks and recreational facilities and is known across the region for its linear Portage Creek Bicentennial Park Trail. Additional connection of the city's trail system to other regional trails, improving non-motorized transportation routes, is vital.
- » The city has plentiful groundwater resources; however, groundwater levels in the region have risen meaningfully, which is causing flooding concerns in certain Portage neighborhoods. Stormwater causes street flooding on certain neighborhood streets.
- » Monitoring drinking water quality for contaminants is critical. A nearby community discovered elevated levels of PFAS in their water system. Testing undertaken on the Portage water system produced just trace amounts PFAS in three wells.
- » The city employs a strong communication strategy, including a monthly printed newsletter (the *Portager*), a recently re-launched city website (portagemi.gov), five Facebook pages and a number of online resources for residents. Efforts are expected to be continued to advance and enhance technology for the improvement of city services and citizen outreach.
- » Certain of our public facilities are aging. The city intends to construct a new Portage Community Senior Center, contingent on a successful capital campaign, currently underway.

About the City Manager

The next City Manager of Portage will be an energetic, bold and dynamic leader. The city is proud of its position as the economic engine for the region. The City Manager will play a key role assisting the City Council in developing policy and implementing plans to continue the economic growth of the region.

The successful candidate will have a track record of community involvement with the expressed desire and intent to manage in a community with the characteristics of Portage and to do so into the foreseeable future.

Minimum Requirements

A Bachelor's Degree (Master's Degree preferred) in business or public administration, combined with at least five (5) years of experience as a local government manager or full-range assistant in a community comparable to Portage. Critical skills include finance, budget, economic development, organizational analysis, written and verbal communications, visioning and strength of both character and conviction. The successful candidate must be a superior manager and leader.

Characteristics of the Ideal Candidate

Important Knowledge, Skills and Abilities

- » A thorough understanding of developmental economics
- » A record of successful collaboration with other jurisdictions
- » A strategic thinker who sets and directs the tactical steps designed to meet the goals set by the Mayor and City Council
- » A record of successful development including industrial, retail and residential

Style with the Mayor and City Council:

- » Performs both publicly and privately in an apolitical manner
- » Is available and accessible to the Mayor and all City Councilmembers
- » Demonstrates excellent oral and written communication skills, which he or she exercises regularly with the Mayor and City Council as a whole

Style with Staff

- » Fosters a customer service culture
- » Trusts and supports staff
- » Facilitates communication and service coordination among departments and individual staff members
- » Consistently follows City Council policy
- » Is fair, evenhanded and consistent
- » Is a coach and mentor; encourages and supports individual professional development

Style with the Community

- » Places emphasis on community relations over the day-to-day staff management challenges
- » Is engaged; regularly attends civic and community meetings
- » Is visible; attends community events
- » Is a "go to" person to get things done

Compensation

The compensation for the City Manager position will be highly competitive. The starting compensation is dependent upon the selected individual's qualifications and matched with the desired attributes being sought by the city. The city will pay reasonable and customary moving expenses for the next City Manager.

To Apply

In order to be considered for this position, please send your resume and cover letter with current salary to ***slavin@bellsouth.net***. The recruitment period will remain open until the position is filled.

For additional information about this job, please contact:

Mr. Robert Slavin, President
Slavin Management Consultants
3040 Holcomb Bride Road, Suite A-1
Norcross, GA 30071-1357
P (770) 449-4656 | F (770) 416-0848
slavin@bellsouth.net | slavinweb.com

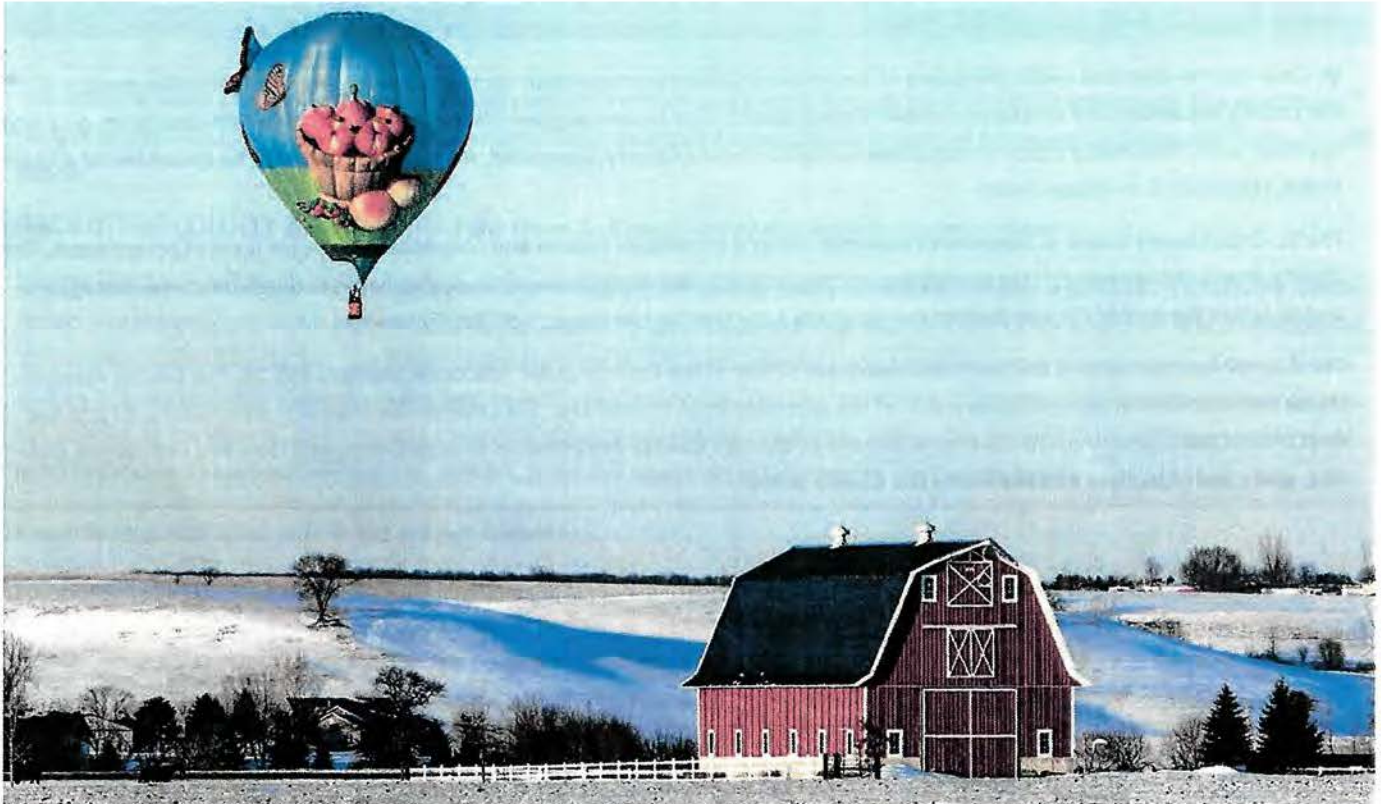


AN EQUAL OPPORTUNITY RECRUITER / EMPLOYER

St. Croix County, Wisconsin

Invites your interest in the position of

COUNTY ADMINISTRATOR



ABOUT ST. CROIX COUNTY

With a population of just over 90,000, St. Croix County is among the fastest growing counties in the state of Wisconsin and is home to an area full of history, vibrant communities of artists, and some of the most beautiful landscapes in the Midwest.

Visit one of the County's historic communities to spend a relaxing day exploring boutiques and antique shops full of unique finds. In between shopping, take a break and grab a refreshing beverage at a local café or tavern. Later you can entertain with dinner at one of the many eateries found throughout St. Croix County. No matter which community you visit in St. Croix County, you'll be sure to find a variety of locally owned and nationally-known stores and eateries. If you are looking for adventure, you can hike the State and County parks, explore the many lakes and rivers, sail the beautiful St. Croix riverway, and so much more.

St. Croix County is served by an Interstate, state highways, and County roads that provide ease of travel to the cities, towns, villages, and recreational areas in the County. Located just east of the Twin Cities metro area offers advantages like best-in-class business services, cultural amenities, and easy access to the Minneapolis-St. Paul International Airport. Although the State's fastest growing county, St. Croix is home to a large semi-rural area with an exceptional quality of life.

Education is a priority of all communities within St. Croix County. The school districts are known to provide a wonderful student-to-faculty ratio. Throughout the County are six school districts providing education from pre-k through 12th grade. In addition to rigorous academics, students have the opportunity to join various clubs, sports programs, and extracurricular activities. The educational opportunities do not stop after high school. Graduates and non-traditional students alike can expand their knowledge and be better

prepared for employment through the post-secondary educational opportunities in and around the County. Local technical colleges and universities offer education programs in the areas of agriculture, business, trade and industry, and a variety of bachelor and master's degree programs.

Residents have access to hospitals, clinics and pharmacies that provide services to suit everyone's needs. A variety of medical providers, dental providers, and alternative medicine such as chiropractic care can be found in the area.

St. Croix County supports a healthy community for families and businesses to grow and prosper.

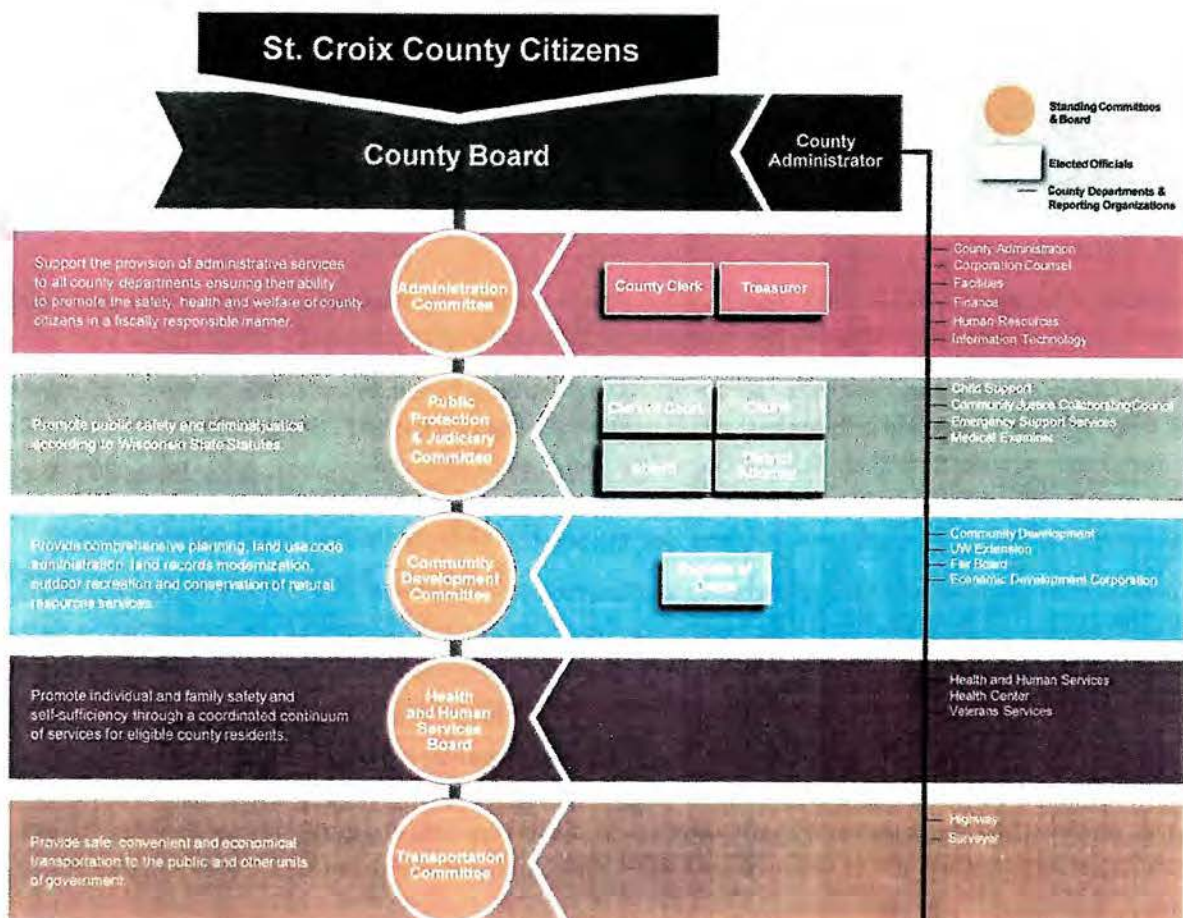
Additional information about St. Croix County is available at www.sccwi.gov.

GOVERNANCE AND ORGANIZATION

St. Croix County operates under the Board of Supervisors/County Administrator form of government. The legislative powers of the County are vested in a nineteen-member County Board. The Supervisors are elected by district, for a two-year term, on a non-partisan basis. No County officer or employee is eligible to be a County Supervisor. A Supervisor may also be a member of a town board, city council, or village board.

The St. Croix County Board of Supervisors operates under a committee system and county administrator form of government. The County Board of Supervisors' responsibilities are to exercise policy supervision of County activities through its committee system and to adopt the annual County Budget and establish a tax rate for the support of County services.

The County Administrator is the chief administrative officer of the County under Wisconsin Statutes §59.18. The County Administrator works under the general supervision of the Administration Committee. The County Administrator administers, directs and coordinates the activities of the County personally or through County departments in accordance with laws and ordinances, policies, goals and objectives established by the County Board.





The Office of Administration oversees a budget over \$104 million and a work force of more than 650 employees. The operating budget as well as a five-year Capital Improvement Plan is developed annually and presented for review and approval by the County Board.

ABOUT THE COUNTY ADMINISTRATOR (From St. Croix County Administrator Job Description)

The County Administrator is the chief administrative officer of the County under Wisconsin Statutes sec. 59.18. The County Administrator is appointed by, and is accountable to, the County Board. The County Administrator works under the general supervision of the Administration Committee. The County Administrator provides sound information and recommendations to the County Board so they may make policy decisions in the best interests of the County. The County Administrator then administers and coordinates the policies of the County; and manages the overall County operations in a fiscally responsible manner through department heads in accordance with laws and ordinances, policies, goals and objectives established by the County Board.

Essential responsibilities include but are not limited to:

- Directs, supervises, and coordinates all administrative and management functions of the County's departments and agencies under direct jurisdiction or fiscal control of the County Board. Ensures effectiveness and efficiency of the day-to-day operations of all County government functions.
- Researches and recommends the establishment and modification of County policies and interprets for and advises department heads concerning board policies, directives, and expectations. Ensures the policies and programs adopted by the County Board are effectively carried out.
- Appoints and supervises all department heads of the County, other than the Constitutional officers who are elected in general elections. Appointments of department heads are subject to County Board confirmation.
- Ensures all finances and resolutions adopted by the County Board are faithfully executed.
- Appoints the members of all boards and commissions that are not elected by the County Board, subject to the confirmation of the County Board.
- Directs the preparation of all research, studies, and reports the County Board may require concerning operations of the County; prepares plans and programs for the County Board's consideration in anticipation of future needs.
- Oversees the County's contracts for goods and services.
- Collaborates with the County Board in establishing clearly defined metrics that measure the implementation and outcomes of the County Board Policies and Processes. Reviews with the County Board the established metrics on a quarterly basis.
- Attends all meetings of the County Board and the Committee of the Whole, except when excused by the County Board Chair, and advises the County Board and/or recommends courses of action to the County Board. Attends and participates in meetings of County Board standing committees as needed.

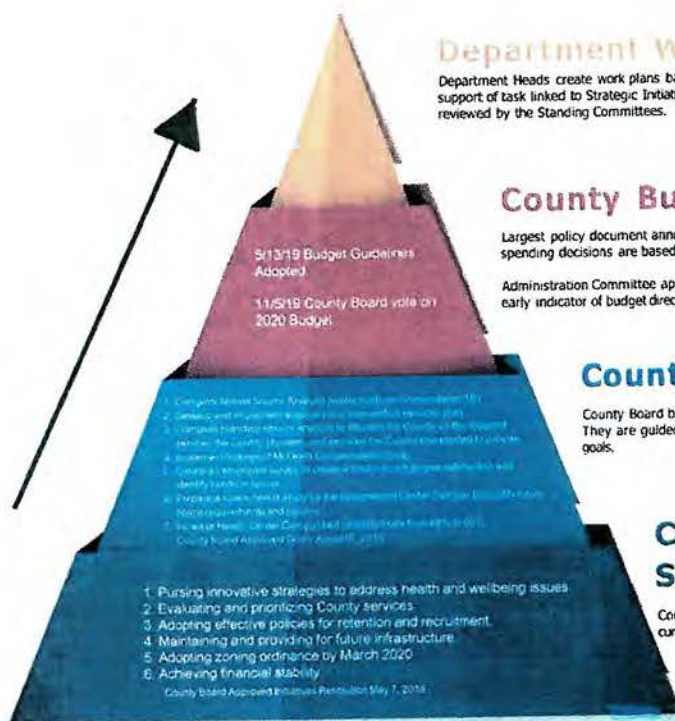
(Continued on page 5)

County Budget

Administration Committee approves Budget Guidelines which are an early indicator of budget direction.

County Administrator Goals

County Board Strategic Initiatives

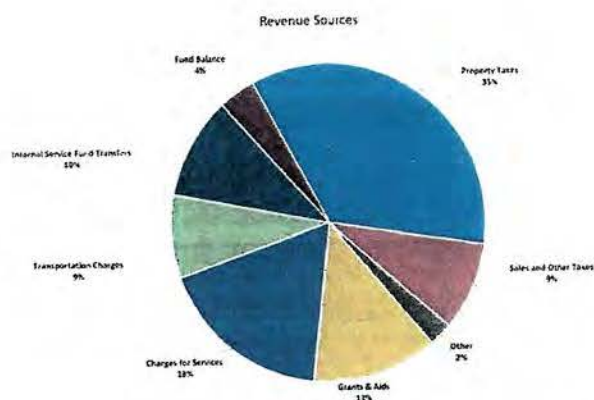


Budgeted Revenues	2019 Budget	2020 Recommended	Change
Property Taxes	14,336,265	30,366,478	2,080,193
Other Taxes	8,767,000	9,316,700	548,700
Intergovernmental	12,758,241	13,548,200	79,950
Permits, Fees, Penalties	690,200	757,700	67,500
Charges for Services	16,407,170	18,881,221	2,074,051
Transportation Charges	8,434,500	8,671,674	237,174
Miscellaneous	1,168,525	1,819,504	650,979
Internal Service Funds	8,955,000	10,745,000	1,780,000
Fund Balance	6,375,095	4,514,390	(1,860,705)
	<u>\$ 97,922,016</u>	<u>\$ 104,211,486</u>	<u>\$ 6,289,470</u>

- Taxes Up: Net New Cost: \$800,000 and Debt Service \$1,200,000
- Sales Tax Growth
- HHS Funding and Charges for Services
- Health Insurance Program Increases
- Extra Debt Payment in 2019 with Fund Balance

Budgeted Expenditures	2019 Budget	2020 Recommended	Change
General Government	12,791,000	11,975,100	\$ 816,900
Internal Department Funds	19,460,000	19,355,000	2,005,000
Capital Projects	2,914,000	2,747,700	\$ 166,300
Public Safety	13,612,111	14,411,379	(799,268)
Health and Human Services	28,474,634	31,890,962	(2,913,316)
Highways	17,012,061	17,041,467	(29,406)
Economic Development	2,261,708	2,156,581	\$ 105,127
Conservation and the Environment	2,064,442	1,226,244	2,641,602
Debt Service	2,904,000	3,643,133	(12,606,566)
	\$ 62,022,016	\$ 101,711,386	\$ 5,285,375

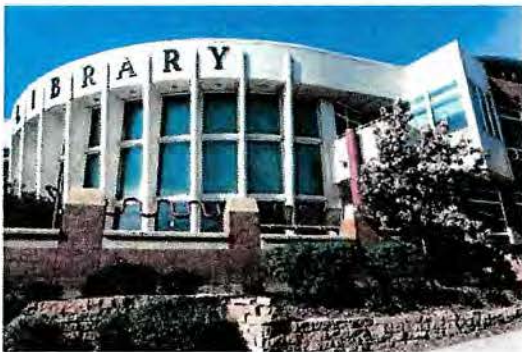
- New Pension Health Insurance, Contract Increases
- Health Insurance
- New Pension Operating Expense Increases
- HRIS Program Expansion Due to Service Delivery Demands
- Pass Thru Contracts
- Extra Debt Payment in 2019



County Bond Rating

St. Croix County's Aa1 rating is second highest possible rating

Moody's	# of Rated Counties
Aaa	5
Aa1	11
Aa2	14
Aa3	7
A1	2
A2	3
A3	0
Total	42



- Supports the County Board by assisting with the preparation of County Board meeting agendas and minutes, and all resolutions and ordinances to be presented to the County Board.
- Provides the County Board with regular reports and data regarding County programs and activities.
- Monitors, reviews and keeps the County Board fully informed of any federal and state administrative, legislative and judicial developments that may affect or impact the County. Solicits and represents the County Board's position on proposed legislation, drafts responses to legislators and others and recommends amendments. At the request of or with approval by the County Board, represents the County at state legislative meetings or hearings, or engages in lobbying efforts, on behalf of the County.
- Directs long-range strategic planning for all County activities.
- Presents capital improvement program proposals to the County Board.
- Evaluates, on a continuing basis, the levels of service provided by County departments and recommends the establishment and/or modification of policies, procedures, or operating standards. Recommends reorganization, improvement, or development of new functions, or abandonment of unnecessary functions, to the County Board.
- Works with the Administration Committee to establish procedures and schedules for the preparation of each annual County budget based on priorities established by and directives of the County Board. Conducts and schedules budget meetings and/or hearings on budget requests with the Administration Committee. Attends budget meetings of and makes budget recommendations to the County Board.
- Executes the adopted budget, ensuring that all expenditures of County funds are made in strict compliance with the budget; reviews and administers all department and agency requests for adjustments or transfers of budgeted funds with Finance and the Administration Committee as required by law and County policy.
- Makes regular financial reports to the County Board, keeping the County Board fully advised as to the financial condition of the County and its future financial needs.
- Develops financial plans in which revenues and expenditures are projected against anticipated County growth and recommends methods of financing future needs.

CURRENT ISSUES AND OPPORTUNITIES

- St. Croix County recently hired a Public Information Officer to further public understanding of the services provided by the County. Residents are generally satisfied with the County government.
- St. Croix is essentially two counties; the urban/suburban west side is within an easy commute to the Twin Cities while the east side is very rural and agricultural. The urban/rural divide is growing as the County is experiencing the most rapid county population growth in Wisconsin.
- A variety of issues, such as water protection and land use, lead to differing urban/rural points of view.
- Rural areas of the County are concerned that they may receive less consideration than their more urban neighbors.
- A looming issue -- the County needs a comprehensive office space needs analysis and to develop a creative, efficient and economical plan for office space and service provision. Courts, the jail and some administrative offices are at or nearing capacity.
- COVID-19 poses both a health as well as a financial concern to the County, although the virus has not yet significantly hit St. Croix County.
- Wisconsin governments are under a state budget tax levy limit. New growth is exempt.

REQUIREMENTS

St. Croix County plans to hire an energetic, bold, and dynamic leader as its next County Administrator. The County Administrator will assist the Board of Supervisors in developing policy while diligently working to implement their policies and managing the day-to-day operations for the Board.

The successful candidate will have a solid track record of successful collaborative management that meets the policy objectives of the governing board and that provides exceptional public services which benefit the entire County.

Education and Experience

- Master's Degree in Public Administration, Business Administration, or related field.
- Ten years' experience in a progressively responsible management position in a complex organization.
- Five years senior management level experience in public sector.
- ICMA Credentialed Manager certification is preferred

Characteristics of the Ideal Candidate

Important Knowledge, Skills and Abilities

- Appreciates the structure and management challenges inherent in Wisconsin counties.
- Understands the programmatic, service delivery and space needs for jurisdictions facing a rapidly growing and diversifying population.
- Possesses a record of successful collaboration with other jurisdictions.
- Is a self-starter and strategic thinker who sets and directs the tactical steps designed to meet the goals set by the Board.
- Experienced in managing complex financial and human relations challenges.
- Offers evidence of staying current in the profession

Style with the Board of Supervisors and other elected officials:

- Supports the policy-making prerogatives of the Board of Supervisors.
- Performs both publicly and privately in an apolitical manner.
- Is available and accessible to all Board members.
- Exemplifies integrity and high personal ethics in all actions

- Demonstrates excellent oral and written communication skills which are exercised regularly with the Board of Supervisors as a whole.
- Facilitates the building and implementation for a strategic plan with the Board.

With Staff

- Fosters a positive and highly motivated customer service culture.
- Develops feedback loops and/or surveys of recently served customers to assess the level of customer service and any emerging trends of improvement or deterioration of service satisfaction.
- Trusts and supports staff.
- Facilitates communication and service coordination among departments and individual staff.
- Develops performance metrics which demonstrate the degree Board goals are attained and Board policy followed.
- Is a fair, evenhanded and consistent team builder.
- Can be counted on to coach and mentor while encouraging and supporting individual professional development.

With the Community

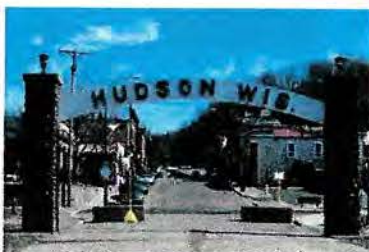
- Understands at times conflicting viewpoints of urban/suburban/rural constituencies.
- Anticipates the needs of jurisdictions with rapidly growing populations.
- As necessary responds to invitations to attend civic and community meetings.

TO APPLY

The position will remain open until filled. A first review of resumes is scheduled for November 13, 2020. Please e-mail a detailed resume with a cover letter and current salary to:



Robert E. Slavin or David Krings
SLAVIN MANAGEMENT CONSULTANTS
3040 Holcomb Bridge Road, A1
Norcross, Georgia 30071
Phone: (770) 449-4656
Fax: (770) 416-0848
E-mail slavin@bellsouth.net



St. Croix County is an Equal Opportunity Employer

PRO FORMA INVOICE

INVOICE DATE: _____

CLIENT: _____

ADDRESS: _____

CITY, STATE: _____

Progress billing for professional services
rendered in connection with our agreement:

(Invoice __ of __) \$XXXX.XX

Reimbursable expenses at cost:

Airfare	\$ XXX.XX
Hotel	XX.XX
Ground Transportation	XX.XX
Meals	XX.XX
Tips	XX.XX
Telephone	XXX.XX
Clerical Support	XXX.XX
FAX	XX.XX
Messenger Service	XX.XX
Copies	XX.XX
Postage	XX.XX
Misc. Direct Costs	XX.XX

Total Expenses \$XXXX.XX

TOTAL INVOICE **\$XXXX.XX**

CLIENT LIST BY CATEGORY

The following list of clients represent organizations for which our principal Consultants performed significant project work. This client list spans thirty years of experience of SMC consultants. Please contact SMC if you desire to speak with the individuals who were project contacts.

MUNICIPALITIES

Aiken, South Carolina	Corinth, TX
Albany, Georgia	Creedmoor, North Carolina
Alpharetta, Georgia	Culver City, California
Anaheim, California	Dallas, Texas
Ann Arbor, Michigan	Davenport, Iowa
Arlington, Texas	Davie, Florida
Arlington Heights, Illinois	Decatur, Georgia
Arvada, Colorado	Decatur, Illinois
Atlanta, Georgia	Delray Beach, Florida
Atlantic Beach, Florida	Del Rio, Texas
Asheville, North Carolina	Denton, Texas
Auburn, Maine	Destin, Florida
Aurora, Colorado	Dothan, Alabama
Austin, Texas	Dubuque, Iowa
Bartlesville, Oklahoma	Duluth, Georgia
Bentonville, Arkansas	Dunedin, Florida
Bergenfield, New Jersey	Durham, North Carolina
Berkeley, California	Eagle Pass, Texas
Beverly Hills, California	East Brunswick Township, New Jersey
Birmingham, Alabama	Edmond, Oklahoma
Bisbee, Arizona	Elgin, Illinois
Blacksburg, Virginia	Enfield, Connecticut
Bloomington, Illinois	Englewood, Colorado
Bothell, WA	Escondido, California
Boynton Beach, Florida	Evanston, Illinois
Branson, Missouri	Fort Collins, Colorado
Brea, California	Fort Lauderdale, Florida
Bridgeport, Connecticut	Fort Smith, AR
Broken Arrow, Oklahoma	Fort Worth, Texas
Brownsville, Texas	Frankfort, Kentucky
Bryan, Texas	Franklin, Tennessee
Burbank, California	Frisco, Colorado
Camarillo, California	Gainesville, Florida
Carson, California	Gainesville, Georgia
Cary, North Carolina	Galesburg, Illinois
Casper, Wyoming	Garden City, New York
Chapel Hill, North Carolina	Glastonbury, Connecticut
Charlotte, North Carolina	Glendale, Arizona
Cherry Hills Village, Colorado	Glen Ellyn, Illinois
Chesapeake, Virginia	Golden, Colorado
Clearwater, Florida	Grand Rapids, Michigan
Cleveland, OH	Greensboro, North Carolina
Columbia, Missouri	Gulfport, Florida
Columbus, Georgia	Hardeeville, SC
Concord, New Hampshire	Hemet, California
Coral Springs, Florida	Hercules, California
Corpus Christi, Texas	Highland Park, Illinois
Corta Madera, California	Hollywood, Florida

Homestead, Florida
Huntington Beach, California
Independence, Missouri
Independence, Kansas
Iowa City, Iowa
Jacksonville Beach, Florida
Jupiter, Florida
Kalamazoo, Michigan
Kansas City, Missouri
Lake Worth, Florida
Lakewood, Colorado
Lapeer, Michigan
Laramie, Wyoming
Laredo, Texas
Lenexa, Kansas
Liberty, Missouri
Lillburn, Georgia
Little Rock, Arkansas
Long Beach, California
Longmont, Colorado
Manassas, Virginia
Mansfield, Massachusetts
Maplewood, Missouri
Marshfield, Missouri
Miami Beach, Florida
Milwaukie, Oregon
Minneapolis, Minnesota
Miramar, Florida
Modesto, California
Muscatine, Iowa
Neptune Beach, Florida
Newark, Delaware
New Smyrna Beach, Florida
Norfolk, Virginia
Norman, Oklahoma
North Las Vegas, Nevada
North Miami Beach, Florida
Northglenn, Colorado
North Port, Florida
Norwich, Connecticut
Oberlin, Ohio
Ocean City, Maryland
Oceanside, California
Olathe, Kansas
Oklahoma City, Oklahoma
Orlando, Florida
Oxnard, California
Palm Bay, Florida
Palm Beach Gardens, Florida
Palo Alto, California
Panama City, Florida
Park Ridge, Illinois
Pasadena, California
Peoria, Illinois
Phoenix, Arizona
Pittsburg, Kansas
Pompano Beach, Florida
Portage, Michigan

Pueblo, Colorado
Richmond, California
Richmond, Virginia
Riverside, California
Riverview, Michigan
Roanoke, Virginia
Rock Hill, South Carolina
Rockville, Maryland
Sacramento, California
St. Louis Park, Minnesota
Salem, Oregon
San Diego, California
San Fernando, California
San Francisco, California
San Jose, California
San Juan Capistrano, California
Sandersville, Georgia
Santa Ana, California
Santa Monica, California
Sarasota, Florida
Shaker Heights, Ohio
Simi Valley, California
Sioux City, Iowa
Snellville, Georgia
South Brunswick Township, New Jersey
Springfield, Missouri
Steamboat Springs, Colorado
Stratford, Connecticut
Storm Lake, Iowa
Sunnyvale, California
Sunrise, Florida
Takoma Park, Maryland
Topeka, Kansas
Titusville, Florida
Thornton, Colorado
Traverse City, Michigan
Topeka, Kansas
Turlock, California
Upper Arlington, Ohio
Urbana, IL
Urbandale, Iowa
Valdez, Alaska
Venice, FL
Virginia Beach, Virginia
Waco, Texas
Warrensburg, Missouri
Washington, Illinois
West Des Moines, Iowa
West Hartford, Connecticut
West Hollywood, California
West Palm Beach, Florida
Wichita, Kansas
Windham, Connecticut
Winston-Salem, North Carolina
Winter Park, Florida
Worthington, Minnesota
Ypsilanti, Michigan

COUNTIES

Adams County, Colorado	Martin County, Florida
Alameda County, California	McHenry County, Illinois
Albemarle County, Virginia	Mecklenburg County, North Carolina
Arapahoe County, Colorado	Mendocino County, California
Beaufort County, South Carolina	Mesa County, Colorado
Broward County, Florida	Moffat County, Colorado
Brown County, Wisconsin	Monterey County, California
Buffalo County, Nebraska	Muscatine County, Iowa
Buncombe County, North Carolina	New Kent County, Virginia
Chaffee County, Colorado	Orange County, New York
Cass County, Michigan	Orange County, North Carolina
Chesterfield County, Virginia	Palm Beach County, Florida
Clark County, Nevada	Peoria County, Illinois
Cobb County, Georgia	Pinellas County, Florida
Dade County, Florida	Polk County, Florida
Dunn County, Wisconsin	Prince William County, Virginia
Eagle County, Colorado	Ramsey County, Minnesota
Escambia County, Florida	St. Louis County, Minnesota
Fairfax County, Virginia	Saline County, Kansas
Forsyth County, Georgia	San Diego County, California
Fremont County, Colorado	San Luis Obispo County, California
Fresno County, California	San Mateo County, California
Fulton County, Georgia	Sarasota County, Florida
Georgetown County, South Carolina	Sedgwick County, Kansas
Glynn County, Georgia	Seminole County, Florida
Gunnison County, Colorado	Sonoma County, California
Hall County, Georgia	Springettsbury Township, Pennsylvania
Hamilton County, Ohio	Spotsylvania County, Virginia
Johnson County, Kansas	Tazewell County, IL
Ketchikan-Gateway Borough, Alaska	Volusia County, Florida
Lake County, Florida	Wake County, North Carolina
Lake County, Illinois	Washtenaw County, Michigan
La Plata County, Colorado	Whiteside County, Illinois
Leon County, Florida	Whitfield County, Georgia
Lincoln County, North Carolina	Yolo County, California
Livingston County, Illinois	
Los Angeles County, California	

OTHER ORGANIZATIONS

Development Groups

Arrowhead Regional Development, Duluth, Minnesota
Columbia Development Corporation, South Carolina
Fresno Economic Development Commission, California
Fresno Redevelopment Authority, California
GoTopeka, Inc., Kansas
Lincoln Road Development Corporation, Miami Beach, FL
Los Angeles, California, Community

Redevelopment Agency

Mid-American Regional Council, Kansas City, Missouri
West Palm Beach Downtown Development Authority, Florida

Housing Authorities

California Housing Finance Agency
Jefferson County Housing Authority, Alabama
Las Vegas Housing Authority
Memphis Housing Authority, Tennessee
Ocala Housing Authority, Florida

Peoria Housing Authority, Illinois

Libraries

Birmingham, Alabama Public Library
Central Arkansas Library System
Lexington, Kentucky Library System
Metropolitan Library System of Oklahoma
Moline Public Library

Non-Profits and Other Governmental Jurisdictions

California State Government
CDC Federal Credit Union, Atlanta, Georgia
District of Columbia
Fresno Employment and Training Commission, California
Jefferson County Personnel Board, Alabama
Local Government Insurance Trust, Maryland
Los Angeles, California Department of
Community Public Health Los Angeles,
California Music Center Operating Company
Los Angeles Olympics Organizing Committee
Metropolitan Nashville, Tennessee Arts
Commission
Parkland Hospital, Texas
Southwest Florida Regional Planning Council

Professional Associations

American Public Works Association
Association of County Commissioners, Georgia
Georgia Municipal Association
International City/County Management
Association
Iowa League of Cities
Missouri Municipal League

School Districts

Adams County School District #14, Commerce
City, Colorado
Lake Sumpter Community College, Florida
Dallas Independent School District, Texas

Transportation Agencies

Alameda-Contra Costa Transit District, Oakland,
California
Bay Area Rapid Transit District, Oakland,
California
Dallas Area Rapid Transit District, Dallas, Texas
Greater Dayton Regional Transportation
Authority
Kalamazoo County Transportation Authority
Lee County Port Authority, Florida
Metra (Chicago Commuter Rail System)
MetroPlan Orlando (MPA)
Port Everglades Authority, Fort Lauderdale,
Florida
Orlando - Orange County Expressway Authority
Port of Sacramento, California
Riverside Transit Agency, California
San Francisco Bay Area Rapid Transit District,
California
Sarasota/Manatee Airport Authority, Florida
Southern California Rapid Transit District

Utilities

Columbus Water Works, Georgia
Greater Peoria Sanitation District
Gulf Shores Utilities
Metropolitan Sewer District of Greater Cincinnati,
Ohio
Orange Water and Sewer Authority (North
Carolina)
Public Works Commission of Fayetteville, North
Carolina
Rivanna Solid Waste Authority, Virginia
Rivanna Water and Sewer Authority, Virginia
Sacramento Municipal Utility District, California
South Florida Water Management District
Spartanburg Utility District, South Carolina

EEO STATEMENT

Slavin Management Consultants (SMC) is committed to building a diverse workforce which reflects the face of the community we serve, honors and respects the differences and abilities of all our employees and residents, and provides employees with the necessary opportunities, tools, and support to achieve their maximum potential.

Equitably managing a diverse workforce is at the heart of equal opportunity. Valuing diversity is the basis for a policy of inclusion. Diversity recognizes and respects the multitude of differences which employees bring to the workplace. Diversity complements organizational values that stress teamwork, leadership, empowerment, and quality service. Diversity means striving to maintain an environment in which managers value the differences in their employees and take steps to ensure that all employees know they are welcome.

To achieve workplace equity and inclusion, SMC will observe the practices outlined below:

- We will ensure that we do not discriminate in employment on the basis of race, color, religion, national origin, sex, age, disability, marital status, sexual orientation, creed, ancestry, medical condition, or political ideology.
- Our recruiting efforts will ensure that applicant pools are both capable and diverse.
- We will make employment decisions based on job-related criteria and will provide opportunities for entry and promotion into non-traditional jobs.
- We will ensure a workplace free of all forms of harassment.
- We will develop a procedure for prompt, thorough and impartial investigations of discrimination or harassment complaints and will act on appropriate measures to provide remedy or relief to individuals who have been victims of illegal discrimination or harassment.

Measures to ensure accountability for managing diversity will be incorporated into the performance management system for supervisors and managers. The chief executive officer will evaluate the effectiveness of our diversity policies and programs.

By creating a workplace where everyone can work towards their maximum potential, SMC will retain quality, productive employees who will provide excellent services to our clients.

SMC SEXUAL HARASSMENT POLICY

Slavin Management Consultants (SMC) is committed to providing a workplace that is free from sexual harassment. Sexual harassment in the workplace is against the law and will not be tolerated. Should the company determine that an allegation of sexual harassment is credible, it will take prompt and appropriate corrective action.

What Is Sexual Harassment?

Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitutes sexual harassment when:

- An employment decision affecting that individual is made because the individual submitted to or rejected the unwelcome conduct; or
- The unwelcome conduct unreasonably interferes with an individual's work performance or creates an intimidating, hostile, or abusive work environment.
- Certain behaviors, such as conditioning promotions, awards, training or other job benefits upon acceptance of unwelcome actions of a sexual nature, are always wrong.

Unwelcome actions such as the following are inappropriate and, depending on the circumstances, may in and of themselves meet the definition of sexual harassment or contribute to a hostile work environment:

- Sexual pranks, or repeated sexual teasing, jokes, or innuendo, in person or via e-mail;
- Verbal abuse of a sexual nature;
- Touching or grabbing of a sexual nature;
- Repeatedly standing too close to or brushing up against a person;
- Repeatedly asking a person to socialize during off-duty hours when the person has said no or has indicated he or she is not interested (supervisors in particular should be careful not to pressure their employees to socialize);
- Giving gifts or leaving objects that are sexually suggestive;
- Repeatedly making sexually suggestive gestures;
- Making or posting sexually demeaning or offensive pictures, cartoons or other materials in the workplace;
- Off-duty, unwelcome conduct of a sexual nature that affects the work environment. A victim of sexual harassment can be a man or a woman.
- The victim can be of the same sex as the harasser.
- The harasser can be a supervisor, co-worker, other company employee, or a non-employee who has a business relationship with the Slavin Management Consultants.

SMC's Responsibilities Under This Policy:

If SMC receives an allegation of sexual harassment, or has reason to believe sexual harassment is occurring, it will take the necessary steps to ensure that the matter is promptly investigated and addressed. If the allegation is determined to be credible, SMC will take immediate and effective measures to end the unwelcome behavior. SMC is committed to take action if it learns of possible sexual harassment, even if the individual does not wish to file a formal complaint.

SMC will seek to protect the identities of the alleged victim and harasser, except as reasonably necessary (for example, to complete an investigation successfully). SMC will also take the necessary steps to protect from retaliation those employees who in good faith report incidents of potential sexual harassment. It is a violation of both federal law and this policy to retaliate against someone who has reported possible sexual harassment. Violators may be subject to discipline.

Employees who have been found by SMC to have subjected another employee to unwelcome conduct of a sexual nature, whether such behavior meets the legal definition of sexual harassment or not, will be subject to discipline or other appropriate management action. Discipline will be appropriate to the circumstances, ranging from a letter of reprimand through suspensions without pay of varying lengths to

separation for cause. A verbal or written admonishment, while not considered formal discipline, may also be considered.

Employees' Rights and Responsibilities Under This Policy

Any employee who believes he or she has been the target of sexual harassment is encouraged to inform the offending person orally or in writing that such conduct is unwelcome and offensive and must stop.

If the employee does not wish to communicate directly with the offending person, or if such communication has been ineffective, the employee has multiple avenues for reporting allegations of sexual harassment and/or pursuing resolution.

Employees are encouraged to report the unwelcome conduct as soon as possible to his or her supervisor or to the President of SMC.

In addition to reporting sexual harassment concerns to a responsible SMC official, employees who believe they have been subjected to sexual harassment may elect to pursue resolution in several ways, including:

Mediation: Mediation is an informal way to resolve office problems using a trained mediator who facilitates communication between the parties to the dispute. If an employee chooses to attempt resolution through mediation, management is obligated by Company policy to send a representative to the table. If a resolution is not reached, the parties may continue to pursue their rights in any other appropriate forum.

EEO processes: All SMC employees can file an Equal Employment Opportunity (EEO) complaint with the United States Equal Employment Commission (EEOC). An employee who wishes to file a complaint under EEO procedures must consult an EEO counselor within 45 days of the alleged incident. It is not necessary for an employee to complain to his/her supervisor before approaching an EEO counselor, nor to attempt informal resolution through mediation or other means. EEOC contact Information:
<https://eeoc.com>. Phone 1 (800) 669-4000

All SMC employees are required to comply with this policy. Employees are also expected to behave professionally and to exercise good judgment in work-related relationships, whether with fellow employees, business colleagues, or members of the public with whom they come into contact in the course of official duties. Further, all employees are expected to take appropriate measures to prevent sexual harassment. Unwelcome behavior of a sexual nature should be stopped before it becomes severe or pervasive and rises to a violation of law.

MINORITY AND WOMEN PLACEMENTS

CLIENT	POSITION	AFRICAN AMERICAN	WOMAN	LATINO
ALACHUA COUNTY, FL	County Administrator			X
ALBANY, GA	City Manager	X		
	Police Chief	X		
	Assistant City Manager	X		
	Human Resources Director	X		
ASPEN, CO	City Manager		X	
AUSTIN, TX	City Auditor		X	
	City Manager		X	
	Police Chief			X
BERKELEY, CA	City Manager	X		
	Public Works Director			X
BEVERLY HILLS, CA	Sanitation Director	X		
	Library Director		X	
BOCA RATON, FL	City Manager		X	
	Asst. City Manager		X	
BOTHELL, WA	City Manager		X	
BOISE, ID	Chief Financial Officer	X		
BROWARD COUNTY, FL	Assistant Director of Equal Employment	X	X	
	Director of Budget	X		
BOISE, ID	Chief Financial Officer		X	
BRYAN, TX	Municipal Court Judge		X	
	City Manager		X	
BUNCOMBE COUNTY, NC	County Manager	X	X	
CAMARILLO, CA	City Clerk		X	
CARSON, CA	Planning Director		X	
CHAPEL HILL, NC	Transportation Director		X	
	Human Resources Director		X	
CHARLOTTE COUNTY, FL	County Attorney		X	
CENTRAL CITY ASSN. OF THE CITY OF LOS ANGELES (CA)	Director of Security	X		
CHARLOTTE, NC	Neighborhood Services Director	X		
COLUMBIA, MO	Police Chief	X		

CLIENT	POSITION	AFRICAN AMERICAN	WOMAN	LATINO
CORINTH, TX	Director of Economic Development			X
CORPUS CHRISTI, TX	City Manager			X
CULVER CITY, CA	Finance Director			X
DALLAS INDEPENDENT SCHOOL DISTRICT (TX)	Chief Financial Officer	X	X	
DALLAS, TX	City Attorney		X	
DECATUR, GA	Chief of Police	X		
DISTRICT OF COLUMBIA	Executive Director Alcoholic Beverage Regulations Commission		X	
DURHAM, NC	City Manager	X		
	City Manager	X	X	
	Police Chief		X	
	Public Works Director	X	X	
ESCAMBIA COUNTY, FL	Assistant County Administrator	X		
ESCONDIDO, CA	Civic Center Construction Mgr		X	
FRANKFORT, KY	City Manager		X	
EVANSTON, IL	City Manager		X	
FRESNO, CA (PIC)	Executive Director	X		
FORT COLLINS, CO	City Attorney		X	
FORT LAUDERDALE, FL	Fire Chief	X		
FORT MYERS, FL	City Manager	X		
	Police Chief	X		
FORT WORTH, TX	Auditor General		X	
	Police Chief	X		
FRANKLIN, TN	Director of Community Development		X	
FRESNO, CA (PIC)	Executive Director	X		
GAINESVILLE, FL	Equal Employment Director	X		
GEORGETOWN, SC	City Administrator		X	
GEORGETOWN COUNTY, SC	County Manager	X	X	
GLASTONBURY, CT	Human Resources Director	X	X	
GLENWOOD SPRINGS, CO	City Manager		X	
GREENBELT HOMES, INC. (MARYLAND)	Executive Director		X	
GREENSBORO, NC	Assistant City Manager	X		
GREENVILLE, NC	City Manager	X	X	
HAMILTON COUNTY, OH	Jobs and Family Services Director		X	
HILLSBOROUGH COUNTY (FL) CHILDREN'S BOARD	Executive Director		X	

CLIENT	POSITION	AFRICAN AMERICAN	WOMAN	LATINO
HOLLYWOOD, FL	City Manager	X		
JUPITER, FL	Assistant to the City Manager		X	
	Public Works Director			X
KALAMAZOO, MI	City Manager		X	
	Assistant City Manager		X	
LAKE COUNTY, FL	County Attorney		X	
LAKE COUNTY, IL	Purchasing Director		X	
	Human Resources Director	X		
	Assistant County Administrator		X	
LAKE COUNTY, IL HEALTH DEPARTMENT	Executive Director		X	
LAKE WORTH, FL	Utilities Customer Services Manager	X		
LA PLATA COUNTY, CO	Human Services Director		X	
LAREDO, TX	City Manager			X
LEE COUNTY, FL	County Administrator		X	
	Human Resources Director	X		
LINCOLN ROAD DEVELOPMENT CORP.	Executive Director		X	
LONG BEACH, CA	Police Chief	X	X	
	Executive Director, Civil Service Commission			
LONGMONT, CO	City Manager			X
LONGVIEW, CO	Assistant City Manger		X	
LOS ANGELES, COMMUNITY REDEVELOPMENT AGENCY	Sr. Project Manager	X		X
	Project Manager	X		
	Project Manager			X
LOS ANGELES COUNTY (CA) HEALTH SYSTEMS AGENCY	Executive Director	X	X	
	Deputy Exec. Dir.			X
LOS ANGELES COUNTY DEPARTMENT OF PUBLIC HEALTH	Public Health Director	X		
LOS ANGELES OLYMPICS ORGANIZING COMMITTEE	Human Resources Director	X	X	
	Director of Venues		X	
METROZOO (MIAMI FL)	Director of Marketing		X	
MEMPHIS (TN) HOUSING AUTHORITY	Executive Director	X		
MIAMI (FL) OFF-STREET PARKING SYSTEM	Finance Director			X

CLIENT	POSITION	AFRICAN AMERICAN	WOMAN	LATINO
MIAMI VALLEY REGIONAL TRANSIT AUTH. (DAYTON, OH)	Executive Director	X	X	
MIRAMAR, FL	City Manager		X	
MONTEREY COUNTY, CA	Hospital Administrator	X		
MONTGOMERY COUNTY BOARD OF DEVELOPMENTAL DISABILITIES	Executive Director	X	X	
MOUNT DORA, FL	City Manager		X	
NOAH DEVELOPMENT CORPORATION	Executive Director	X		
NEWARK, DE	City Manager	X		
NORFOLK, VA	Human Resources Director	X		
	Senior Engineer		X	
NORFOLK, VA	Social Services Director	X		
OAK PARK, IL	Village Manager		X	
OCALA (FL) PUBLIC HOUSING AUTHORITY	Executive Director	X		
OBERLIN, OH	City Manager		X	
ORLANDO, FL	Fire Chief	X		
ORMOND BEACH, FL	City Manager	X		
OKLAHOMA CITY, OK	City Manager	X		
PALM BAY, FL	Human Resources Director		X	
PALM BEACH COUNTY, FL	Assistant County Administrator		X	
PALM BEACH COUNTY (FL) CHILDREN'S SERVICES BOARD	Executive Director		X	
PALM BEACH COUNTY (FL) HEALTH CARE DISTRICT	Executive Director		X	
PALM BEACH GARDENS, FL	City Manager (1992) City Manager (1999)		X	X
PALO ALTO, CA	City Attorney		X	
PARKLAND, FLORIDA	City Manager		X	
PEORIA (IL) PUBLIC HOUSING AUTHORITY	Executive Director	X		
PHOENIX, AZ	Chief of Police			X
PRINCE WILLIAM COUNTY, VA	County Executive		X	
	Human Resources Director	X	X	
	Fire Chief	X	X	
RICHMOND, CA	City Manager	X		
RICHMOND, VA	Director of Public Health	X		

CLIENT	POSITION	AFRICAN AMERICAN	WOMAN	LATINO
ROANOKE, VA	Police Chief	X		
	Economic Development Director		X	
	Assistant City Manager	X	X	
	Director of Human Services		X	
ROCKVILLE, MD	Assistant City Manager		X	
SACRAMENTO, CA	Human Resources Director	X	X	
SAGINAW, MI	Police Chief			X
SAN DIEGO, CA	City Manager	X		
SAN FRANCISCO, CA	Assistant City Administrator		X	
SAN JOSE, CA	Police Chief	X		
SANTA MONICA, CA	Deputy City Manager		X	
SARASOTA, FL	Human Resources Director	X		
SARASOTA COUNTY, FL	Deputy County Administrator	X		
SELMA, AL	Chief of Police	X		
SHAKER HEIGHTS, OH	City Administrator		X	
SOUTH DAKOTA STATE LEGISLATURE	Chief Legislative Analyst		X	
SUNNYVALE, CA	Public Information Officer		X	
	City Clerk		X	
STRATFORD, CT	Human Resources Director		X	
TAKOMA PARK, MD	City Manager		X	
	Recreation Director	X	X	
	Housing and Community Development Director		X	
	Public Works Director	X		
THORNTON, CO	Public Information Officer		X	
	City Attorney			X
TOPEKA, KS	City Manager	X		
	Police Chief	X		
VALDEZ, AK	City Manager	X		
VENICE, FL	Police Chief		X	
VIRGINIA BEACH, VA	Human Resources Director	X		
VIRGINIA BEACH PARK TRUST (FL)	Executive Director	X		
VOLUSIA COUNTY, FL	County Manager		X	
	Budget Director		X	
	Human Resources Director		X	
	Deputy County Manager		X	

CLIENT	POSITION	AFRICAN AMERICAN	WOMAN	LATINO
WACO, TX	Deputy City Manager		X	
	Exec. Dir. - Support Services			X
	Assistant City Manager	X		
	Director of Facilities			X
WAKE COUNTY, NC	Human Services Director			X
THE WEINGART CENTER (LOS ANGELES)	Executive Director		X	
WEST COVINA, CA	Planning Director	X	X	
WEST MIFFLIN, PA	Town Administrator		X	
WEST PALM BEACH, FL	Assistant City Administrator	X	X	
WICHITA, KS	Human Resources Dir	X	X	
	Community Services Dir	X	X	
	Communications Director		X	
	Director of Libraries		X	
	Housing and Development Director	X	X	
	City Manager	X		
WYOMING, OHIO	City Manager		X	
YPSILANTI, MI	City Manager	X		
ZOOLOGICAL SOCIETY OF FLORIDA (DADE COUNTY)	Executive Director			X



City of Huber Heights, Ohio

RFP 21-001-CC

Proposal to provide a City Manager search

August 2, 2021

ORIGINAL

 **bakertilly**
now, for tomorrow.

cost to the City of Huber Heights.

- 🕒 **Timeline:** Provide an estimated, standard timeline for installation, implementation and creative design services. **Timeline should be included in bid documents.**
- 🔧 **Configuration and Pricing:** Bidder must itemize all charges for individually identifiable components of the proposed system, including all associated installation, programming and training if applicable. Bidder must include charges for all components required to connect any applicable applications.

RFP Checklist:

Please review and check off these 10 most important items to consider when responding to an RFP for the City of Huber Heights:

✓	Read the <u>entire</u> document. Note critical items such as: mandatory requirements; supplies/services required; submittal dates; number of copies required for submittal; contract requirements (i.e., contract performance, insurance requirements, performance and/or reporting requirements, etc.).
✓	Note the procedures for communication with the City during the RFP process. All communication during the RFP process must be in writing. Offerors should not contact City personnel or officials outside of the opportunity provided in the document.
✓	Attend the pre-proposal conference if one is offered. These conferences provide an opportunity to ask clarifying questions, obtain a better understanding of the project, or to notify the City of any ambiguities, inconsistencies, or errors in the RFP.
✓	Take advantage of the “question and answer” period. Submit your questions by the due date listed and view the answers given in the formal “addenda” issued for the RFP. All addenda issued for an RFP are posted on the City’s website and will include all questions asked and answered concerning the RFP.
✓	Follow the format required in the RFP when preparing your response. Provide point-by-point responses to all sections in a clear and concise manner.
✓	Provide complete answers/descriptions. Read and answer all questions and requirements. Don’t assume the City or the evaluating staff will know what your company capabilities are or what items/services you can provide, even if you have previously contracted with the City of Huber Heights. The proposals are evaluated based solely on the information and materials provided in your response.
✓	Use the forms provided, if any. e.g., bidders’ submittal page, reference forms, attachment forms, etc.
✓	Before submitting your response, check the City’s website at: www.hhoh.org to see whether any addenda were issued for the RFP.



✓	Review and read the RFP document again to make sure that you have addressed all requirements. Your original response and the requested copies must be identical and be complete. The copies are provided to the evaluating staff members and will be used to score your response.
✓	Submit your response on time. Note all the dates and times listed in the RFP and be sure to submit all required items on time. Late proposal responses are <i>never</i> accepted.

Please Note:

All potential contractors are strongly urged to submit supporting documentation as to their qualifications to perform the Scope of Work.

Certificate of Insurance, Reference List and Timeline must be attached.

If additional comments or conditions are desired, please attach a separate sheet providing details.

Include all proposed equipment specifications; showing manufacturer name, model, etc. depicting unit specifications and other pertinent information.

Certification:

The undersigned on the Bid Proposal certifies that the Instructions to Bidder has been carefully examined, is thoroughly familiar with the terms and specifications applicable to and made part of this Request for Proposal, and understands and is capable of meeting the provisions within to the quality, type and grade of work requested. The undersigned further certifies the prices shown in the schedule of items contained within the Proposal/Bid are in accordance with the conditions, terms and specifications of the proposal and that any exception taken thereto may disqualify the bid.

Signature _____

Chuck Rohre _____

Print Name

chuck.rohre@bakertilly.com _____

Email Address

Baker Tilly US, LLP _____

Company Name

July 29, 2021 _____

Date

Managing Director _____

Title

(214) 608 7477 _____

Phone

Exceptions

Per RFP 7.1, we take exception to the following section of the RFP: Insurance. If selected, we will provide the City with a copy of our standard engagement terms for review. Notwithstanding anything to the contrary in the RFP, should the City wish to propose alternative terms or proceed on the basis of its own format agreement, we will require the ability to negotiate mutually acceptable terms and conditions prior to executing a final contract.



Baker Tilly US, LLP
380 Jackson Street, Suite 300
St. Paul, MN 55101
T: +1 (651) 223 3000
F: +1 (651) 223 3046
bakertilly.com

August 2, 2021

Mr. Anthony C. Rodgers, MPA
Clerk of Council
City of Huber Heights
6131 Taylorsville Road.
Huber Heights, Ohio 45424

Dear Mr. Rodgers:

Baker Tilly US, LLP ("Baker Tilly") appreciates the opportunity to submit the following proposal for executive recruitment services to the City of Huber Heights (the "City") to help you identify your next City Manager. 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 a recruitment firm. However, we believe that our unique approach, highly regarded customer service practices, and our record of identifying and recruiting top level executives in similar roles, sets us apart from our competitors. Additionally, we offer the following unique features:

- **Customized profile development:** working with the Mayor, members of the City Council, designated staff and community, we develop a customized candidate profile based on the required, desired and preferred qualifications, traits and attributes you seek in the individual you interview or hire for your next City Manager. We strive to understand how Huber Heights's current and anticipated needs and organizational priorities will shape your recruiting and selection requirements; then we collaborate with you to develop a nationwide or regional marketing, recruiting and outreach campaign. This approach has proven to effectively allow us to identify, attract and recruit highly qualified candidates for your review.
- **Proprietary management/leadership assessment:** relying on exclusively licensed predictive analytics tools (using data to determine patterns and forecast future outcomes and trends), we administer assessments to selected applicants to help us identify human potential in each of the candidates we present to you. Results are "Real," "Impactful," and "Powerful." Furthermore, these results can provide you with more profound insights into the candidate's management traits and leadership styles based on scientific data.
- **Recorded video interviews:** we ask selected candidates (semi-finalists) to complete a recorded, one-way video interview, using questions developed from your "candidate profile," which gives your review team an additional tool to evaluate the semi-finalists before inviting them to a face-to-face interview.
- **Proprietary online application management:** our exclusively licensed, proprietary online application system enables us to efficiently manage applicant flow, classification and allows us to communicate with each applicant quickly and effectively. We communicate in real time with applicants, thereby engaging and informing them of each step, search related assignment and corresponding timeline throughout the process. Our system also allows us to access, review and evaluate thousands of prior applicants or individuals who have manifested interest in similar positions. Generally, these are individuals who may not be actively seeking a job, but who may be open to "the right opportunity." This is another benefit and advantage we provide to our clients, which enables us to access a larger number of active and passive job seekers.

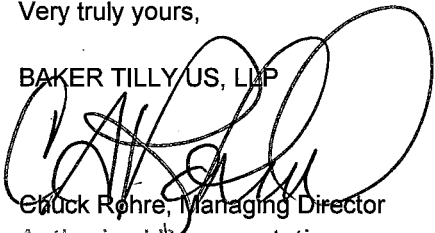
Required statements

- Baker Tilly is a limited liability partnership registered in the States of Illinois and Wisconsin. Our Federal Tax Identification number is 39-0859910.
- Managing Director Chuck Rohre has actual authority to make decisions as to matters relating to this RFP and to bind Baker Tilly.
- This quote meets the minimum qualifications set forth in this RFP and accepts all requirements and terms and conditions contained in this RFP. Exceptions are provided as part of the RFP Checklist.
- Baker Tilly does not discriminate in its employment practice with regard to race, color, age, religion, sex, veteran status, sexual preference, national origin or disability.
- No attempt has been made or will be made by Baker Tilly to induce any other person or firm to submit or not submit a quote.
- Neither Baker Tilly nor any of its agents has a possible conflict of interest with any city employee involved in the RFP and any ensuing Contract(s) or any other conflict of interest.

This proposal details our approach, expertise, references and pricing for this executive recruitment. Our team would consider it a professional privilege to provide these services to the City of Huber Heights.

Very truly yours,

BAKER TILLY US, LLP



Chuck Rohre, Managing Director
Authorized Representative

M: +1 (214) 608 7477

E: chuck.rohre@bakertilly.com



Patty Heminover, Director
Project Team Leader

T: +1 (651) 968 7841

E: patty.heminover@bakertilly.com

Contents

1. GENERAL INFORMATION	1
FIRM INTRODUCTION.....	1
PROJECT CONTACTS AND LOCATIONS.....	1
2. UNDERSTANDING AND APPROACH.....	2
OUR UNDERSTANDING OF HUBER HEIGHTS'S NEEDS	2
RECRUITMENT SOLUTIONS DURING THE COVID-19 PANDEMIC	2
REMOTE WORK	3
PROPOSED SOLUTION TO MEET HUBER HEIGHTS'S NEEDS.....	4
RECRUITMENT APPROACH	5
OUR STRATEGY FOR RECRUITMENT OF DIVERSE CANDIDATES.....	9
COMMITMENT TO DIVERSITY, INCLUSION AND BELONGING FOR SUCCESS (DIBS)	9
WHY BAKER TILLY IS IDEALLY SUITED TO SERVE HUBER HEIGHTS	12
BENEFITS TO HUBER HEIGHTS.....	13
3. TIMELINE	14
4. PROPOSED FEES	15
PROFESSIONAL FEE	15
TRIPLE GUARANTEE.....	16
5. REFERENCES	17
6. EXPERIENCE.....	18
7. PROJECT TEAM MEMBERS	21
8. SAMPLE CERTIFICATE OF INSURANCE.....	30
APPENDIX I: SAMPLE BROCHURE.....	i
APPENDIX II: SAMPLE EXCERPT OF TTI REPORT	ix

1. General information

Firm introduction

Baker Tilly is a nationally recognized firm with a long history of service to clients located throughout the country. For 90 years, Baker Tilly has understood that our business demands absolute integrity, a belief in the value of trusted relationships and a willingness to collaborate with every client. We will strive to continue to deepen and enhance our relationship with Huber Heights as we seek to become your Value Architect™.

Executive recruitment for public and non-profit clients has been a part of Baker Tilly's portfolio of advisory services for more than 30 years. Within Baker Tilly, our executive recruitment team consists of 10 recruitment consultants and project coordination staff available to meet your executive recruitment needs. Each consultant assigned to this recruitment has experience working with cities, counties, special districts and school districts and the many different disciplines that comprise the Huber Heights organization. Baker Tilly's consultants bring an experienced, participatory and energetic perspective to each engagement. Our unique approach and personal touch are reflected in our internal standard to provide outstanding services that exceed your expectations. Our combined consultant team has conducted over 1,500 executive searches.

The Baker Tilly project team will collaborate with the Mayor, City Council and the City's designated staff as your technical advisor to ensure that the recruitment process for your next City Manager is conducted in a thorough and professional manner consistent with "best practices" in the public sector executive recruitment space. Our objective is to generate highly qualified candidates and assist you with the screening and evaluation of these candidates.

Since our firm's beginning, we have 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 only outstanding services and leading-edge products.

Project contacts and locations

Chuck Rohre, Managing Director
2500 Dallas Parkway, Suite 300
Plano, TX 75093

T: +1 (972) 748 0300
M: +1 (214) 608 7477
F: +1 (214) 452 1165
E: chuck.rohre@bakertilly.com

Patty Heminover, Director
380 Jackson Street, Suite 300
Saint Paul, MN 55101

T: +1 (651) 223 3058
M: +1 (651) 968 7841
F: +1 (651) 223 3046
E: patty.heminover@bakertilly.com

2. Understanding and approach

The recruitment will be national and inclusive in nature, with a candidate pool of diverse, experienced and talented individuals.

Our understanding of Huber Heights's needs

We understand the City of Huber Heights is looking for a timely, effective, efficient, responsive, well-managed and thorough search process to recruit and identify highly qualified candidates for your next City Manager.

Baker Tilly will work with the Mayor, City Council, City staff and other designated stakeholders to understand the desired qualities and professional capabilities that are most important to your organization for this recruitment. This information helps us present the City of Huber Heights and the vacancy to well-regarded candidates, emphasizing the opportunities for leadership and professional growth as well as presenting Huber Heights as a vibrant and thriving community in which to live and work.

We recognize that there is significant competition for experienced city managers today. For this reason, we work with you to develop a recruitment strategy that includes 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. Thus, we use existing resources to inform and encourage qualified professionals to apply for opportunities with your organization. We believe that these efforts are critical to ensuring that the City receives a qualified candidate pool.

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

We take pride in our ability to provide the City with comprehensive information about each candidate we present, expanding beyond applications and resumes, to better understand their professional experience, the leadership and management style they will bring to your organization, and their motivation for pursuing this career opportunity. We also assist you in the preparation of interview questions, interview day scheduling, planning and structuring as needed. Additionally, we are available to you and present throughout each interview session and are able to facilitate your deliberations and negotiations with the top candidate.

Recruitment solutions during the Covid-19 Pandemic

In response to the COVID-19 Pandemic, the Baker Tilly executive recruitment team leader will work closely with Huber Heights's designated point of contact to develop alternative methods to complete all aspects of our established search processes using existing technologies and ensure the overall safety of all involved, which may include virtual or telephonic meetings, interviews, or conversations.

2. Understanding and approach

As such, we will creatively collaborate with your organization to provide you with access to critical information you may need to make your hiring decisions. Additionally, we can utilize our capability for video conferencing during meetings, candidate interviews, etc.

When the time arrives for the Mayor and City Council to interview candidates, we may encourage and support the steps established or recommended by local, state or federal guidelines, public health and medical professionals, including social distancing guidelines and protocols.

Baker Tilly has successfully organized several successful virtual and on-site interview processes following the prescribed social distancing protocols and best practices. As such, Patty Heminover is able to provide corresponding on-site support and assistance, if requested.

Remote work

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. As of this writing, our firm is allowing many professionals to work remotely. Because Huber Heights expects and deserves tailored, personalized service, we recognize that this policy may cause concern. **Please understand that we are prepared to deliver an exceptional service experience remotely if necessary.**

The City'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 the City are not able to meet in person, we have web conferencing software – including Zoom and WebEx – to quickly set up online meetings. We also use Microsoft Teams, which facilitates easier communication and project management.

Additionally, we use Huddle, a secure cloud collaboration software, to work together anywhere, anytime and on any device. Huddle provides a platform for Huber Heights and Baker Tilly to come together, share files, assign tasks, and track activity in a secure environment. Using Huddle as a central hub of activity means we all spend less time organizing documents, chasing approvals and searching through email – and more time achieving tangible results. The platform also enables real-time communication, meaning the status of your engagement will always be available. We also use Microsoft Teams, which facilitates easier communication and project management.

The logo for Huddle, featuring the word "huddle" in a bold, lowercase, sans-serif font. A small trademark symbol (TM) is located to the upper right of the word.

2. Understanding and approach

Proposed solution to meet Huber Heights's needs

The recruitment will be conducted out of our Saint Paul, Minnesota office. Patty Heminover will serve as the project team leader. Our proven process includes five major tasks:

1. Recruitment brochure development and advertising

- We schedule and meet with Huber Heights's elected officials, appointed management team members and key stakeholders, as requested, to understand your desired needs, strategic directions, overall candidate expectations and to develop a candidate profile

2. Execution of recruitment strategy and identification of quality candidates

- Using the approved profile, we develop a colorful, appealing brochure and embark on a national or regional targeted recruitment campaign
- Additionally, we simultaneously launch a direct applicant outreach campaign targeting eligible prospects identified via our extensive searchable applicant database
- Using our proprietary applicant tracking system, we communicate and update applicants on key processes and corresponding search progress

3. Screening of applications, recommendation of semi-finalists and selection of finalists

- Once we identify the most promising applicants, we ask them to complete our due diligence questionnaire and a candidate questionnaire while the project team conducts a comprehensive web and social media scan to elicit information that could be relevant to employment
- These applicants also complete a recorded, one-way video interview of selected questions designed to secure a different perspective on the applicant's overall qualifications
- We provide you with a Semi-Finalists Report of the top candidates, which includes resumes, cover letters and due diligence questionnaire responses
- Selected finalists complete a management and leadership style and strengths assessment (personality and behavior analysis) to provide us with important information about their styles, temperament, preference, etc.

4. Conducting background checks (criminal, civil, credit and driving record), reference checks and academic verifications

- Background records checks and academic verification
- References

5. Final interview process

- Once the Mayor and City Council identifies its top 3-5 finalists, we work with you and the finalists to coordinate all aspects of the interview process
- Employment offer – assistance and feedback

2. Understanding and approach

Recruitment approach

Task I. Recruitment brochure development and advertising

The development of a comprehensive recruitment brochure that includes a profile of the ideal candidate is an important first step in your recruitment process. This profile includes the required academic training, professional experience, leadership, management and personal characteristics related to the success of the candidate in the position of City Manager. The recruitment brochure will also include a profile that captures the essence of Huber Heights as a highly-attractive venue for the successful candidate to live and work.

To prepare the recruitment brochure, the project team leader will come on site to meet with the Mayor, City Council, City staff and other designated stakeholders to discuss the required background, professional experience, and management and leadership characteristics for your City Manager. We meet individually (or collectively depending upon your preference) with the Mayor and members of the City Council to broaden our understanding of the position's leadership and management requirements, current issues, your strategic priorities and your expectations for the City Manager. [See example of a recruitment brochure in Appendix I.]

Information obtained from these meetings, coupled with our review of the job description and other City documents, is used to prepare a position and candidate profile. The completed profile will be approved by the City before recruitment begins. The position and candidate profile will be central to our recruitment strategy and outreach to potential candidates.

The project team will also work with the City to develop an advertising and marketing strategy to notify potential candidates about the vacancy and conduct an open recruitment that encourages applications from a talented and diverse pool of candidates. Our team will place ads in appropriate professional publications, websites and local print media, if required, and coordinate with City staff to include information about the search on the City's social media platforms. Additionally, Baker Tilly has a high-traffic website which includes an exclusive location dedicated to encouraging potential candidates to upload their resumes. The aggressive advertising and marketing campaign for top talent will include national, state, regional and local elements as determined during our initial meetings with Huber Heights's representatives. Our customized mailing list, selected from our extensive database and contacts collected at appropriate public-sector conferences, will be utilized to further promote the City Manager position.

Project milestone	Deliverables	Timeline
Position profile and recruitment brochure development	– Interviews with the City – Baker Tilly receives information on Huber Heights's budgets, organizational charts, images, logos, etc. – Develop draft documents (recruitment brochure, advertisement, marketing letter and timeline)	2 weeks
Approve brochure, begin advertising and distribute marketing letter	– Brochure sent to the City for final approval – Commence advertising and distribution of recruitment brochure	1 week

2. Understanding and approach

Task II. Execution of recruitment strategy and identification of quality candidates

Utilizing the information developed in Task I, Baker Tilly will identify and reach out to individuals who will be outstanding candidates for the position of City Manager. Often, well-qualified candidates are not actively seeking new employment and will not necessarily respond to an advertisement. However, if a potential candidate is presented with the opportunity directly and in the proper manner, he or she may apply. We take pride in our ability to locate highly qualified candidates across the nation based on the professional contacts and relationships we have developed and maintained over many years.

These efforts will be supplemented by the creation of a customized database utilizing our extensive, interactive applicant database for the City Manager position. This will provide the Baker Tilly team with the ability to customize applicant flow and tracking, communication with applicants and conduct database inquiries for candidates based on characteristics important to the City such as geographic location, particular experience, expertise and credentials.

During this part of the process the project team will work with the Mayor, City Council and designated City staff to reach consensus on the leadership and management style for the ideal candidate. Our research will determine the key competencies, work values and leadership/management style for the City Manager and match the candidates to each attribute.

While recruitment is under way, the project team will work with a team of up to 10 subject matter experts (SMEs) who know what successful performance in the City Manager position looks like to reach consensus on the desired leadership and management style for the ideal candidate. We ask the SMEs to complete a 30-minute, on-line questionnaire. When aggregated, these responses generate a benchmark that prioritizes the key competencies, work values and leadership/management style attributes for this position, creating a framework for assessing candidate fit with Huber Heights. Later in the process, finalists for the position are asked to complete a companion questionnaire that allows us to match candidates' competencies, work values and leadership/management style to the benchmark. [See sample excerpt of TTI report in Appendix II.]

Each candidate submitting a resume is sent a timely acknowledgement by our team, including an approximate schedule for the recruitment. Throughout the recruitment process, communications are 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 manner in which they are treated during our recruitments.

Project milestone	Deliverables	Timeline
Execution of recruitment strategy and candidate outreach	- Online data collection and profile development - Development of interactive, searchable applicant database for recruitment of the City Manager - Baker Tilly performs direct outreach to prospective candidates identified in the recruitment strategy - Utilization of extensive applicant database to identify applications and review applicant pool for competencies/demographics	4-5 weeks

2. Understanding and approach

Task III. Screening of applicants and recommendation of semi-finalists

In Task III the project team, under the direction of Patty Heminover, will screen the candidates against the criteria within the position and candidate profile and develop a list of semi-finalists for recommendation to the Mayor and City Council. We will then narrow the list to a group of 10-15 semifinalists for review and select finalists on the basis of written candidate questionnaires, early due diligence information, consultant phone interviews and recorded, one-way video interviews.

Another unique aspect of our recruitment process is our use of online recorded interviews for the screening process. Responses are timed and questions are not provided in advance. This tool allows our team to develop a more comprehensive understanding of each candidate's ability to "think on their feet," as well as their personal and professional demeanor. Our team will provide an online link for the Mayor, City Council and designated City staff, as well as others who have input into the hiring decision, allowing them to review and later discuss the recorded responses. This provides your organization with additional candidate assessment tools that can be customized to fit the unique needs of the City of Huber Heights.

Throughout the process, you will have access to our Master Applicant List (MAL), which will provide pertinent data for each applicant.

Project milestone	Deliverables	Timeline
Applicant screening and recommendation of semi-finalists	- Baker Tilly compares applications to the approved candidate profile, developed in our searchable applicant database - Most promising applicants are asked to complete candidate questionnaires and provide due diligence information - Media, internet and social media scan for information pertinent to future employment - Top 10-15 candidates identified as semi-finalists - Semi-Finalist Report is prepared, including the brochure, master applicant list, cover letter and resume of candidates to be considered - Baker Tilly, the Mayor and the City Council review video interviews - Project team leader meets with the Mayor and City Council to review recommended semi-finalists - Mayor and City Council selects finalists for on-site interviews - Finalists complete candidate management style assessment, responses are reviewed and interview questions are developed	2-3 weeks

2. Understanding and approach

Task IV. Conducting background checks, reference checks and academic verifications

When the Mayor and City Council approves of a group of finalists for on-site interviews, Baker Tilly will begin the process of conducting reference checks, background checks and academic verifications. A Confidential Reference Report is prepared for each finalist to complete our understanding of his/her management and leadership characteristics and

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
Judgment/tax lien	Federal district - criminal
Motor vehicle driving record	Federal district – civil litigation
Educational verification	Sex offender registry

To ensure that our quality standards are maintained, we require a minimum of 10-15 business days between the time that you select the finalists for on-site interviews and when we submit the candidate documentation for your final interview process.

Project milestone	Deliverables	Timeline
Design final process with City for on-site interviews with finalists	– Baker Tilly confirms interviews with candidates – Travel logistics are scheduled for candidates	1-2 days
Background and reference checks and academic verification	– Baker Tilly completes background checks, reference checks and academic verifications for finalists	2-3 weeks

Task V. Final interview process

Upon completion of Task IV, we will work with the Mayor, City Council and others designated to develop the final interview process, including the use of virtual platforms as requested. We customize the final interview process according to the needs and functions of the position and according to your preference, instructions and directives to include steps that are important to you, our client. As such, the final interview process may include meetings with the department heads, a City tour and the opportunity for a meet and greet, if requested by the City. In advance of the interviews, we will provide documentation on each of the finalists which will provide the highlights of their leadership/management profile (Gap Analysis) as well as a summary of the results of the reference checks, background 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. In addition, we will assist you with the development of a compensation package and related employment considerations and assist with the negotiation of an employment agreement.

2. Understanding and approach

Project milestone	Deliverables	Timeline
Final Report prepared and delivered to the City	Final Report is prepared; including brochure, interview schedule, cover letter, resume, candidate questionnaire, suggested interview questions, candidate assessment form and management style probing questions	1 day
On-site interviews with finalists	- Interviews are scheduled - Recruitment project team leader attends client interviews and is available to participate during deliberations of candidates - If requested, Baker Tilly participates in candidate employment agreement negotiations	1-2 days
Offer made/accepted	- Baker Tilly notifies candidates of decision - Baker Tilly confirms final process close out items with the City of Huber Heights	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 this recruitment, we will use our established networks to make direct and personal contacts with prospective minority and female candidates and encourage them to consider the City of Huber Heights's City Manager position. Because of our performance record in presenting a diverse applicant pool, these prospective candidates know they will be fairly considered in the process.

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.

Commitment to Diversity, Inclusion and Belonging for Success (DIBS)

At Baker Tilly, diversity, inclusion and belonging is *who we are* rather than *what we do*. 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 Huber Heights.**

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.

We choose to embed DIBS into all aspects of our business – from strategy to operations.

From how we recruit, develop and promote team members, to the way we serve clients, manage projects and treat each other.

Day in, day out.

2. Understanding and approach

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.

DIBS steering committee



Baker Tilly's national DIBS steering committee is designed to strengthen our firm's culture of diversity, inclusion and belonging. Theresa Nickels, partner and chief legal counsel, chairs this committee. A cross-section of leaders across the firm oversee our strategy – from inclusion-related communications to accountability measures for our key diversity goals and coordination of our signature initiatives described below.

Growth and Retention of Women (GROW)



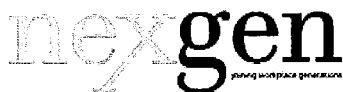
Through our GROW initiative, Baker Tilly provides women valuable opportunities to network, share their stories, acquire skills, strengthen professional relationships and advance in their careers. Our commitment to GROW increases the number of women in management positions, enhances the retention of women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

2. Understanding and approach

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 also 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.

During the past few months, 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 on 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.

Tone from the top: CEO Action for Diversity & Inclusion

CEO **ACTION 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

2. Understanding and approach

Why Baker Tilly is ideally suited to serve Huber Heights

There are many reasons Baker Tilly has distinguished itself from peers in public sector executive recruitment. What makes Baker Tilly different from other firms? **Our executive recruitment solution truly begins with your needs.** The City of Huber Heights deserves to work with a provider that goes beyond checking your recruitment boxes through proactive, responsive insights, a tailored approach and communication. We encourage you to consider how the unique combination of our qualifications make us the right fit to serve the City– today and for years to come.

We are experienced and passionate about what we do

Baker Tilly executive recruitment consultants are highly 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. Our 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.

We are focused on exceeding your expectations

We believe in local government and want to assist the City of Huber Heights organization 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.

We believe that “ethical business practices” are a catalyst for success

These practices include operating with transparency, responsiveness and sensitivity to the culture of your organization while pursuing an unrelenting commitment to high quality and professional services.

We believe in diversity

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.

We conduct a timely, high-quality recruitment that is within budget

For an all-inclusive, not-to-exceed professional fee that 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 Huber Heights’s needs and to unexpected circumstances that may develop during the course of a recruitment in order to expedite the recruitment, but not at the expense of finding high quality candidates for the City.

We utilize the latest technologies that uniquely sets us apart

Technology plays an important 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 Mayor and City Council with unique information about each candidate’s leadership and management style and ability to respond extemporaneously to video questions.

We offer a “Triple Guarantee” that commits us to the City’s success

- We remain focused to assist with your executive recruitment until you make an appointment
- We guarantee your executive recruitment for 12 months against termination or resignation for any reason – or we come back to fill the City Manager position for no additional professional fee
- We will not directly solicit any candidates selected under this contract for another position while the candidate is employed with your organization

2. Understanding and approach

Benefits to Huber Heights

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

Comprehensive and structured process

Our process is comprehensive and seamless, reflecting our years of interaction with local government employers and prospective candidates.

Transparency

Baker Tilly comes to the City without having any preconceived notions or expectations about the City and prospective candidates. The Baker Tilly team works closely with the City to make sure the process is transparent.

Confidentiality

Prospective candidates know that their application will be kept confidential, allowing them to express interest in the City Manager position without jeopardizing their current employment. Our reputation for ensuring candidate confidentiality as permitted by state and local law means that the City can count on maximizing the number of qualified candidates interested in the position.

Candidate recruitment

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 City 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.

Focused use of the City's time

Baker Tilly's comprehensive process incorporates the active participation of the Mayor and City Council members 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 large amounts of time on the recruitment process or to put aside other pressing issues facing the City.

Minimize staff disruption

Baker Tilly's search process also minimizes disruptions to Huber Heights'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.

Thorough evaluation of candidates

The City seeks a City Manager 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.

3. Timeline

Below is an estimated timeline for the executive recruitment process. You will be asked during the first on-site meeting to review and approve a timeline for the recruitment project. It is our intent to conduct the recruitment expeditiously, but not at the expense of finding high-quality candidates for you.

City of Huber Heights, Ohio Executive Recruitment Preliminary Timeline

The following timeline represents a preliminary schedule for your executive recruitment based on a commencement date of August 16. Actual target dates will be developed in consultation with and approved by the Mayor and City Council.

Project milestone	Deliverables	Target Date
Profile development, advertising and candidate outreach	- Baker Tilly completes interviews to develop candidate profile and recruitment brochure; the City approves ad placement schedule and timeline - Baker Tilly sends draft recruitment brochure to the City - The City returns draft recruitment brochure (with edits) to Baker Tilly - Baker Tilly commences executive recruitment advertising and marketing - Online data collection and profile development - Baker Tilly commences formal review of applications; most promising candidates complete questionnaires - Candidates complete recorded interview online - Baker Tilly completes formal review of applications and sends selected resumes to the Mayor and City Council for review	September
Applicant screening and assessment and recommendation of semi-finalists	- Candidates' recorded interviews are presented - Baker Tilly meets with the Mayor and City Council and recommends semi-finalists; the Mayor and City Council selects finalists for on-site interviews - Finalists complete candidate management style assessment and responses are reviewed and interview questions are developed	October
Comprehensive background check, academic verifications and reference checks completed for finalists	- Baker Tilly completes reference checks / background checks/ academic verification on finalists	November
On-site Interviews with finalists	- Baker Tilly sends documentation for finalists to the Mayor and City Council - The Mayor and City Council conducts on-site interviews with finalists	November
Employment offer made / accepted	- The Mayor and City Council extends employment offer to selected candidate	TBD

4. Proposed fees

The all-inclusive professional fee to conduct the recruitment is provided below.

Professional fee

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. Travel expenses incurred by candidates for on-site interviews with the client are not the responsibility of Baker Tilly and are handled directly by the client organization.

The all-inclusive professional fee will be billed in four installments: 30% of the fee will be billed at the beginning of the recruitment; 30% at the implementation of Phase I; 30% at the implementation of Phase II; and 10% upon acceptance of an offer by the candidate.

All questions regarding the professional fees and project-related expenses should be directed to Patty Heminover at patty.heminover@bakertilly.com or via phone at (651) 968 7841.

Phase	Description of professional services	Fee
Phase I	Task 1 Candidate profile development/advertising/marketing lead consultant hourly rate – approximately 14 hours	\$3,150
	research/project management staff hourly rate – approximately 16 hours	\$1,700
	Task 2 Identify quality candidates lead consultant hourly rate – approximately 14 hours	\$3,150
	research/project management staff hourly rate – approximately 16 hours	\$1,700
Phase II	Task 3 Preliminary screening & initial report to client lead consultant hourly rate – approximately 18 hours	\$4,150
	research/project management staff hourly rate – approximately 20 hours	\$2,000
	Task 4 Reference checks, background checks, assessments and academic verifications lead consultant hourly rate – approximately 11 hours	\$2,500
Phase III	research/project management staff hourly rate – approximately 12 hours	\$1,300
	Task 5 Final process/on-site interviews with finalists lead consultant hourly rate – approximately 14 hours	\$3,150
	research/project management staff hourly rate – approximately 16 hours	\$1,700
Conclusion	Acceptance of offer by candidate	
TOTAL ALL-INCLUSIVE PROFESSIONAL FEE		\$24,500

4. Proposed fees

Optional services for consideration	Fee
At the City of Huber Heights's option, Baker Tilly will conduct a web-based survey to determine key community-wide issues and priorities that could be considered in the selection of a new City Manager. This survey is completed by community leaders, citizens and City employees and would alter the project timeline.	\$1,650
On rare occasions, Baker Tilly is asked to provide additional search services that are not included in this scope of service or to provide more than three on-site visits to the City of Huber Heights. Additional work specifically requested by the City which is outside of the scope of this project will be invoiced at the hourly rate of \$220 plus expenses. Baker Tilly will submit a written explanation of the additional services to be provided and the estimated hours that will be required prior to commencing any additional services.	\$220 per hour plus expenses

Triple guarantee

Our Triple Guarantee is defined as:

1. A commitment to remain with the recruitment assignment until you have made an appointment for the fees and tasks quoted in this proposal. If you are unable to finalize selection from the initial group of finalists, Baker Tilly will work to identify a supplemental group until you find a candidate to hire.
2. Your executive recruitment is guaranteed for 12 months against termination or resignation for any reason. The replacement recruitment will be repeated with no additional professional fee, but will include project-related expenses. Candidates appointed from within your organization do not qualify for this guarantee. This guarantee is subject to further limitations and restrictions of your state laws.
3. Baker Tilly will not directly solicit any candidates selected under this contract for any other position while the candidate is employed with your organization.

5. References

Feel free to contact any of the individuals listed below to verify the quality of work Baker Tilly provides to each client as part of these recently completed executive recruitment projects.

City of Willmar, Minnesota

Name	Marv Calvin	Title	Mayor
Phone	(320) 212 2171	Email	Mcalvin@willmarmn.gov
Address	333 Southwest 6th Street, Willmar, MN 56201-0755		

City of Oakdale, Minnesota

Name	Christina Volkens	Title	City Administrator
Phone	(651) 730-2705	Email	Chris.voklers@ci.oakdale.mn.us
Address	1584 Hadley Avenue North, Oakdale, MN 55128-5408		

City of Scottsbluff, Nebraska

Name	Raymond Gonzales	Title	Retired Mayor
Phone	(308) 631-0947	Email	rgonzales@kelleybean.com
Address	2525 Circle Drive, Scottsbluff, NE 69361		

City of Edina, Minnesota

Name	Kelly Curtin	Title	Human Resources Director
Phone	(952) 826-0402	Email	kcurtin@edinamn.gov
Address	4801 West 50th Street, Edina, MN 55424		

City of Lakeville, Minnesota

Name	Tammy Schutta	Title	Human Resources Manager
Phone	(952) 985-4491	Email	tschutta@lakevillemn.gov
Address	20195 Holyoke Avenue West, Lakeville, Minnesota 55044-9177		

6. Experience

The following is a list of executive recruitments recently conducted by members of the Baker Tilly team.

List of relevant projects: 2016 to present				
Year	Client	State	Project	Population
Current	Carrboro	NC	Town Manager	21,230
Current	Clearwater	FL	City Manager	115,159
Current	College Park	MD	City Administrator	32,196
Current	Inver Grove Heights	MN	City Administrator	34,344
Current	North Kansas City	MO	City Administrator	4,477
Current	Shakopee	MN	Assistant City Administrator	40,731
2021	Corpus Christi	TX	Assistant City Manager	323,733
2021	Evansville	WI	City Administrator/Finance Director	5,378
2021	Long Grove	IL	Village Manager	7,956
2021	Moline	IL	City Administrator	41,902
2021	Rockville	MD	Deputy City Manager	66,940
2020	Boone County	IL	County Administrator	53,513
2020	Eau Claire	WI	City Manager	68,866
2020	Fairmont	MN	City Administrator	10,126
2020	Front Royal	VA	Town Manager	15,239
2020	Herington	KS	City Manager	2,304
2020	Kansas City	MO	City Manager	488,943
2020	Lake Ozark	MO	Asst City Admin/Comm Eco Dev Director	1,792
2020	Maple Plain	MN	City Administrator	1,807
2020	Matanuska-Susitna Borough	AK	Borough Manager	108,317
2020	Missouri City	TX	City Manager	74,705
2020	Moose Lake	MN	City Administrator	2,798
2020	Oakdale	MN	City Administrator	28,083
2020	Rochester	MN	City Administrator	114,011
2020	Scottsbluff	NE	City Manager	14,874
2020	St. Joseph	MO	City Manager	74,959
2019	Beeville	TX	City Manager	12,937
2019	Cloquet	MN	City Administrator	11,938
2019	Hobbs	NM	City Manager	37,764
2019	Lake Lotawana	MO	City Administrator	2,099
2019	Norman	OK	City Manager	122,843

6. Experience

List of relevant projects: 2016 to present				
Year	Client	State	Project	Population
2019	Paris	TX	City Manager	24,800
2019	Park City	KS	City Administrator	7,499
2019	Port Arthur	TX	City Manager	53,937
2019	Willmar	MN	City Administrator	19,628
2018	Addison	TX	City Manager	15,368
2018	Asheville	NC	City Manager	89,121
2018	Ashland	OR	City Administrator	21,636
2018	Avondale	AZ	City Manager	82,881
2018	Belle Plaine	MN	City Administrator	6,838
2018	Billings	MT	City Administrator	110,323
2018	Burnsville	MN	City Manager	61,434
2018	Christiansburg	VA	Town Manager	21,533
2018	Grand Rapids	MI	City Manager	192,294
2018	Herington	KS	City Manager	2,362
2018	Kingman	AZ	City Manager	29,029
2018	Maricopa	AZ	City Manager	46,903
2018	Middleburg	VA	Town Administrator	828
2018	Mora	MN	City Administrator/Public Utilities GM	3,453
2018	Salina	KS	City Manager	46,994
2018	Shawnee	KS	City Manager	64,323
2018	York	PA	Business Administrator	43,859
2017	Berthoud	CO	Town Administrator	5,807
2017	Christiansburg	VA	Town Manager	21,533
2017	Cloquet	MN	City Administrator	11,938
2017	Dickinson	TX	City Administrator	19,595
2017	El Dorado	KS	City Manager	12,852
2017	Glenview	IL	Village Manager	45,417
2017	Lake Havasu City	AZ	City Manager	53,743
2017	Littleton	CO	City Manager	44,275
2017	Manassas Park	VA	City Manager	16,149
2017	Morehead City	NC	City Manager	9,203
2017	Mounds View	MN	City Administrator	12,525
2017	Oldsmar	FL	City Manager	13,913
2017	Orono	MN	City Administrator	8,009
2017	Riviera Beach	FL	City Manager	33,263
2017	Rochester	MN	City Manager	110,742
2017	Roxbury Township	NJ	Township Manager	23,324
2016	Cary	NC	Town Manager	151,088
2016	Charter Township of Kalamazoo	MI	Township Manager	20,918
2016	Christiansburg	VA	Town Manager	21,533

6. Experience

List of relevant projects: 2016 to present				
Year	Client	State	Project	Population
2016	Circle Pines	MN	City Administrator	4,953
2016	Commerce	TX	City Manager	8,276
2016	Crested Butte	CO	Town Manager	1,519
2016	Deerfield Beach	FL	Assistant City Manager	78,041
2016	Denton	TX	City Manager	123,099
2016	Dumfries	VA	Town Manager	5,168
2016	Fredericksburg	VA	City Manager	28,132
2016	Greensboro	NC	Assistant City Manager	279,639
2016	Hayden	CO	Town Manager	1,801
2016	Jersey Village	TX	City Manager	7,862
2016	Mankato	MN	Deputy City Manager	40,641
2016	Medford	OR	City Manager	77,677
2016	Mooreville	NC	Town Manager	34,887
2016	Moorhead	MN	City Manager	39,398
2016	Moose Lake	MN	City Administrator	2,787
2016	North Branch	MN	City Administrator	10,087
2016	Roswell	NM	City Manager	48,611
2016	Shakopee	MN	Assistant City Administrator	39,167
2016	Virginia	MN	City Administrator	8,661
2016	Warsaw	VA	Town Manager	1,498
2016	Wayzata	MN	City Manager	4,217
2016	Williamsburg	VA	Assistant City Manager	15,206

7. Project team members

The Baker Tilly project team is designed specifically for the City of Huber Heights.

The project team represents experienced professionals who will be working on your City Manager recruitment. Our service team is selected to meet four very specific objectives for the City: 1) it represents the staff who will be directly responsible for your projects; 2) it provides a range of expertise to cover the range of service requirements; 3) it provides a national perspective of experience and institutional knowledge to achieve your future objectives; and 4) it represents the commitment to take personal and professional responsibility for the services and outcomes for the City of Huber Heights.

Project team leader

Patricia Heminover, Director

T: +1 (651) 223 3058

E: patty.heminover@bakertilly.com

Additional project team members

Chuck Rohre, Managing Director

T: +1 (214) 466 2436

E: chuck.rohre@bakertilly.com

Art Davis, Director

T: +1 (816) 868 7042

E: art.davis@bakertilly.com

Sharon Klumpp, Director

T: +1 (651) 223 3053

E: sharon.klumpp@bakertilly.com

Anne Lewis, Director

T: +1 (703) 923 8214

E: anne.lewis@bakertilly.com

Edward G. Williams, Ph.D., Director

T: +1 (214) 842 6478

E: edward.williams@bakertilly.com

Cecilia Hernández, Senior Recruitment Analyst

T: +1 (214) 736 1606

E: cecilia.hernandez@bakertilly.com

Michelle Lopez, Senior Recruitment Analyst

T: +1 (651) 223 3061

E: michelle.lopez@bakertilly.com



Our engagement team
has completed nearly
400 successful
searches since 2016.

Patricia Heminover

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



Baker Tilly US, LLP **Director**

380 Jackson Street
Suite 300
Saint Paul, MN 55101
United States

T +1 (651) 223 3058

M +1 (651) 968 7841

patty.heminover@bakertilly.com
bakertilly.com

Education

Master of Education, Administration
Minnesota State University – Mankato

Mini MBA Program, Human Resources Management
University of Saint Thomas (Saint Paul, Minnesota)

Bachelor of Science, Consumer Science, Business
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

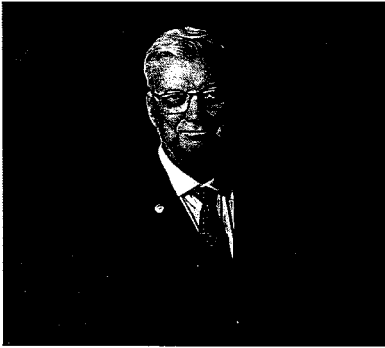
- Minnesota Association of School Administrators (MASA)
- American Association of School Administrators (AASA)
- Minnesota Association of School Business Officials (MASBO)
- River Heights Chamber of Commerce, Member
- State Negotiators Association,
Minnesota School Board Association
- Patty has received 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

Charles A. Rohre

Chuck Rohre, a Managing Director at Baker Tilly, has more than 35 years of experience managing and consulting in both the private and public sectors.



Baker Tilly US, LLP
Managing Director
2500 Dallas Parkway
Suite 300
Plano, TX 75093
United States

T +1 (214) 466 2436
M +1 (214) 608 7477
chuck.rohre@bakertilly.com
bakertilly.com

Education

Master's Degree, Human Relations and Management
Abilene Christian University (Dallas, Texas)

Bachelor of Science, Career Development
Abilene Christian University (Dallas, Texas)

Chuck is responsible for managing and conducting executive recruitment engagements for the firm to ensure their integrity, timeliness and adherence to budget parameters. He also directs the professional and support staff of the executive recruitment practice to ensure best practices, quality control and customer service goals are met.

Specific experience

- Manager of the executive recruitment practice
- Extensive and successful track record of completed recruitments across the nation, especially in Texas, Colorado, Arizona, and the Midwestern states
- Has led more than 400 recruitment engagements in 27 states for key executives such as city and assistant city managers, police chiefs, fire chiefs, library directors, chief information officers, city/county attorneys, parks & recreation directors, finance directors and public works directors, as well as executive directors of not-for-profit and quasigovernmental organizations
- Conducted management consulting assignments in a number of disciplines including public safety, career development and strategic planning
- Written and presented training in a variety of subject areas including personnel assessment, leadership and management skills, and career development for public sector employees
- Prior to beginning his consulting career, served as police chief and director of public safety for North Texas municipalities with populations ranging from 9,000 to 200,000 plus

Continuing professional education

- Certified Behavior Analyst by TTI, Inc.
- Advanced management training at the Institute for Law Enforcement Administration
- Federal Bureau of Investigation, LEEDS course
- Annual participation in the International City/County Management Association Conference
- Annual participation in state and municipal league conference

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.



Baker Tilly US, LLP
Director
9229 Ward Parkway
Suite 104
Kansas City, MO 64114-3311
United States

T +1 (816) 912 2036
M +1 (816) 868 7042
art.davis@bakertilly.com
bakertilly.com

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

Bachelor of Arts, Political Science
and Public Administration
William Jewell College (Liberty, Missouri)

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

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.



Baker Tilly US, LLP
Director
380 Jackson Street
Suite 300
Saint Paul, MN 55101
United States

T +1 (651) 223 3053
M +1 (651) 270 6856
sharon.klumpp@bakertilly.com
bakertilly.com

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

Bachelor of Arts, Political Science
Miami University (Oxford, Ohio)

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)

7. Project team members

Anne Lewis

Anne Lewis, a director with Baker Tilly, has worked for local governments for nearly 20 years.



Baker Tilly US, LLP
Director
8219 Leesburg Pike
Suite 800
Tysons, VA 22182
United States

T +1 (703) 923 8214
anne.lewis@bakertilly.com
bakertilly.com

Education

Master of Science, Organizational Leadership
and Public Administration
Shenandoah University (Winchester, Virginia)

Bachelor of Science, Business Administration
and Management
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 City Manager, Housing Director, Transit Director and Convention & Visitors Bureau City Manager. 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
- Virginia Local Government Management Association (VLGMA), former member of Executive Board
- Virginia Women Leading Government
- Government Finance Officers Association (GFOA)

Community involvement

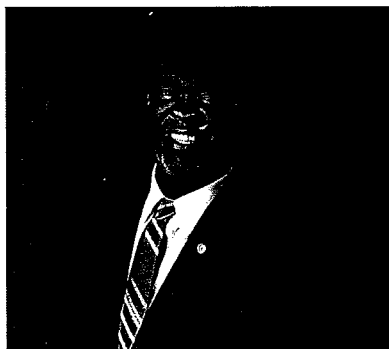
- Shenandoah University Alumni Association, Executive Committee
- Shenandoah Apple Blossom Festival®, Board of Directors

Continuing professional education

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

Edward G. Williams, Ph.D.

Edward Williams, a director at Baker Tilly, brings character, competence and expertise to every search.



Baker Tilly US, LLP
Director
2500 Dallas Parkway
Suite 300
Plano, TX 75093
United States

T +1 (214) 842 6478
M +1 (214) 608 6363
edward.williams@bakertilly.com
bakertilly.com

Languages
English
Spanish

Education
Ph.D., Educational Leadership and Policy Analysis
University of Missouri (Columbia, Missouri)

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

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

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

Cecilia Hernández

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



Baker Tilly US, LLP
Senior Recruitment Analyst
2500 Dallas Parkway
Suite 300
Plano, TX 75093
United States

T +1 (214) 736 1606
cecilia.hernandez@bakertilly.com
bakertilly.com

Languages
English
Spanish

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)

Cecelia 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

7. Project team members

Michelle Lopez

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



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

Baker Tilly US, LLP
Senior Recruitment Analyst
380 Jackson Street
Suite 300
Saint Paul, MN 55101
United States

T +1 (651) 223 3061
michelle.lopez@bakertilly.com
bakertilly.com

Education

Currently pursuing Bachelor of Science, Project Management
Colorado State University – Global Campus

Associate in Arts, Liberal Arts
Minneapolis Community College (Minneapolis, Minnesota)

8. Sample Certificate of Insurance



CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)
01/06/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Aon Risk Services Northeast, Inc. New York NY Office One Liberty Plaza 165 Broadway, Suite 3201 New York NY 10006 USA	CONTACT NAME:	
	PHONE (A/C. No. Ext): (312) 381-1000	FAX (A/C. No.): (312) 381-7007
INSURED Baker Tilly US, LLP P.O. Box 7398 Ten Terrace Court Madison WI 53707-7398 USA	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	NAIC #	
	INSURER A: American Casualty Co. of Reading PA	20427
	INSURER B: The Continental Insurance Company	35289
	INSURER C: Transportation Insurance Co.	20494
INSURER D: Valley Forge Insurance Co	20508	
INSURER E: National Fire Ins. Co. of Hartford	20478	
INSURER F:		

COVERAGES**CERTIFICATE NUMBER:** 570085622870**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. **Limits shown as requested**

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
E	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☒ LOC ☐ OTHER:			C6016751638 General Liability	01/01/2021	01/01/2022	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000
D	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY			6016751641 Auto	01/01/2021	01/01/2022	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
B	☒ UMBRELLA LIAB ☒ OCCUR ☐ EXCESS LIAB ☐ CLAIMS-MADE ☐ DED ☐ RETENTION			6016723001 Umbrella	01/01/2021	01/01/2022	EACH OCCURRENCE \$1,000,000 AGGREGATE \$1,000,000
A B C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	☒ Y ☐ N	N/A	WC 6 16751624 WC 6 23746823 WC643413436 Workers Compensation	01/01/2021 01/01/2021 01/01/2021	01/01/2022 01/01/2022 01/01/2022	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE-EA EMPLOYEE \$1,000,000 E.L. DISEASE-POLICY LIMIT \$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Additional insured applies as respects the General Liability and Automobile Liability when required by written contract subject to the terms and conditions of the respective policies. Primary and Non-Contributory applies on General Liability and Auto Liability when required by a written contract.
A waiver of subrogation applies as respects the General Liability, Auto Liability and Workers Compensation when required by written contract subject to the terms and conditions of the respective policies.

CERTIFICATE HOLDER**CANCELLATION**

Evidence of Insurance	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE <i>Aon Risk Services Northeast Inc.</i>



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
10/01/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Aon Risk Services Northeast, Inc. One Liberty Plaza, 165 Broadway, Suite 3201 New York, N.Y. 10006	CONTACT NAME:	
	PHONE (A/C, No, Ext): 312-381-1000	FAX (A/C, No): 312-381-7007
INSURED Baker Tilly US, LLP Ten Terrace Court Madison, WI 53718	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A : Columbia Casualty Company	
	INSURER B :	
	INSURER C :	
	INSURER D :	
INSURER E :		
INSURER F :		
NAIC #		

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY						
	☐ CLAIMS-MADE ☐ OCCUR						EACH OCCURRENCE \$
							DAMAGE TO RENTED PREMISES (Ea occurrence) \$
							MED EXP (Any one person) \$
							PERSONAL & ADV INJURY \$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$
	☐ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG \$
	OTHER:						\$
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident) \$
	☐ ANY AUTO						BODILY INJURY (Per person) \$
	☐ ALL OWNED AUTOS	☐ SCHEDULED AUTOS					BODILY INJURY (Per accident) \$
	☐ HIRED AUTOS	☐ NON-OWNED AUTOS					PROPERTY DAMAGE (Per accident) \$
							\$
	UMBRELLA LIAB						EACH OCCURRENCE \$
	EXCESS LIAB	☐ OCCUR					AGGREGATE \$
	DED	☐ CLAIMS-MADE					\$
	RETENTION \$						\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						PER STATUTE
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	☐ Y / ☐ N					OTH-ER
	If yes, describe under DESCRIPTION OF OPERATIONS below	N/A					E.L. EACH ACCIDENT \$
							E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability Insurance			ABF-188122608	01-Oct-20	01-Oct-21	Not less than US \$1,000,000 per claim and in the annual aggregate.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER Baker Tilly US, LLP Ten Terrace Court Madison, WI 53718	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Aon Risk Services Northeast, Inc.</i>
---	---

Appendix I: sample brochure



CITY ADMINISTRATOR

INVER GROVE HEIGHTS, MINNESOTA



Search services provided by Baker Tilly Public Sector Executive Recruitment

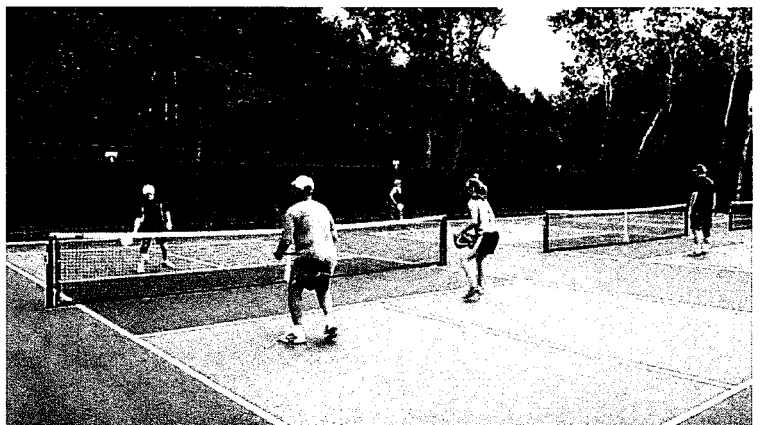
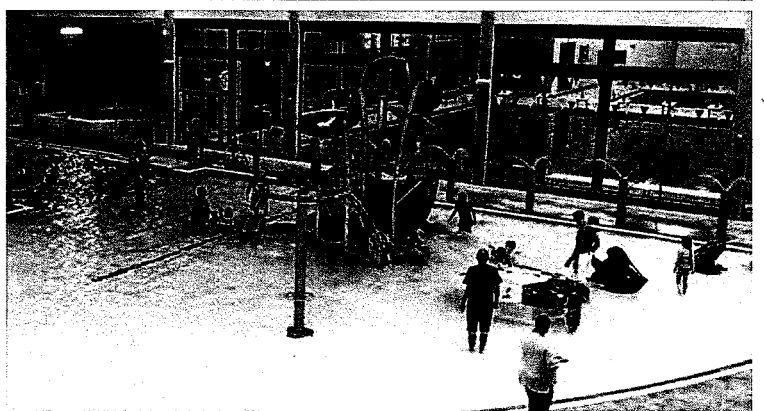
The Community

Inver Grove Heights (pop. 35,077) is a vibrant, diverse, and fast growing community located southeast of the Twin Cities, in close proximity to the Mississippi River. With an area of 30 square miles, the City is poised for continued residential and commercial development. By 2025, its population is projected to reach 46,000. With easy access to Interstate 494 and Minnesota State Highways 52, 55, and 3, City residents are 15 minutes from downtown St. Paul and 25 minutes from downtown Minneapolis.

The largest employers in the area are Flint Hills Corporate Headquarters and Pine Bend Refinery, Cenex/CHS Corporate Headquarters, Inver Grove Heights Community College, ISD 199, and the City of Inver Grove Heights.

Veterans Memorial Community Center provides an array of recreation services to Inver Grove Heights residents. The community center has an ice arena, which includes a section of indoor turf used by lacrosse teams, and The Grove Aquatic and Fitness Center, featuring its own water park. Inver Grove Heights is also home to the Rock Island Swing Bridge, which gives visitors a lovely view of the Mississippi River. The City has 27 parks, including a golf course, an athletic complex at Rich Valley Athletic Complex, and mountain bike trails at Harmon Park Reserve. The Inver Grove Heights Days festival takes place every fall. The celebration is run by local volunteers and features sporting events for all ages, a parade, fireworks, and more.

There are three school districts that serve the community: ISD 199, 196, and 197, with the majority of students attending ISD 199 or 196. ISD 199 has three elementary schools, one middle school, and one high school located within the city. Residents also have access to schools in Apple Valley, Rosemount, Lakeville, Burnsville, and Eagan. Inver Grove Heights is home to Inver Hills Community College, which strives to provide its graduates with transferable or career-focused degrees at an affordable price.





The Organization

The City operates under a statutory form of government consisting of a four-member city council and the mayor who is a voting member. Council members serve four-year staggered terms, with two council members elected every two years and the Mayor elected every two years. Among its primary duties, the City Council establishes a strategic vision for the City, responds to resident concerns, makes laws, sets policies, adopts budgets, and oversees a wide-ranging agenda for the community. The City Council appoints a City Administrator to head administrative functions and direct all city operations, projects, and programs. The City employs a staff of 154 full-time equivalents and 308 part-time/seasonal employees. The City has an all-funds budget of \$60 million.

The City of Inver Grove Heights is a full-service city, including police and fire protection, the construction and maintenance of highways, streets and other infrastructure, water and sewer services, community development support, and recreational activities and cultural events.

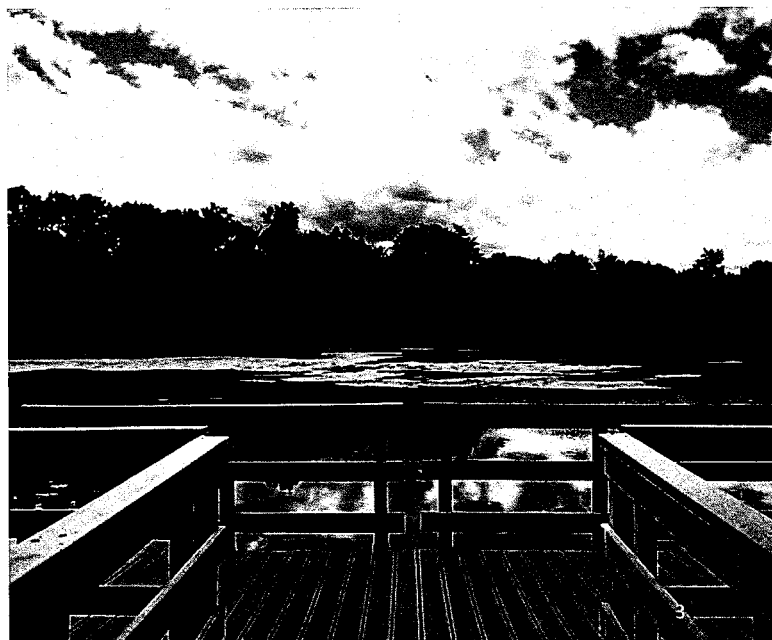


Vision

A welcoming community on the river, with varied landscapes, that provides a safe environment, quality built and sustainable infrastructure, supports local businesses, a variety of housing and promotes culture and recreation.

Mission

The mission of the City of Inver Grove Heights is to provide services and facilities that enhance the quality of life in our vibrant community.



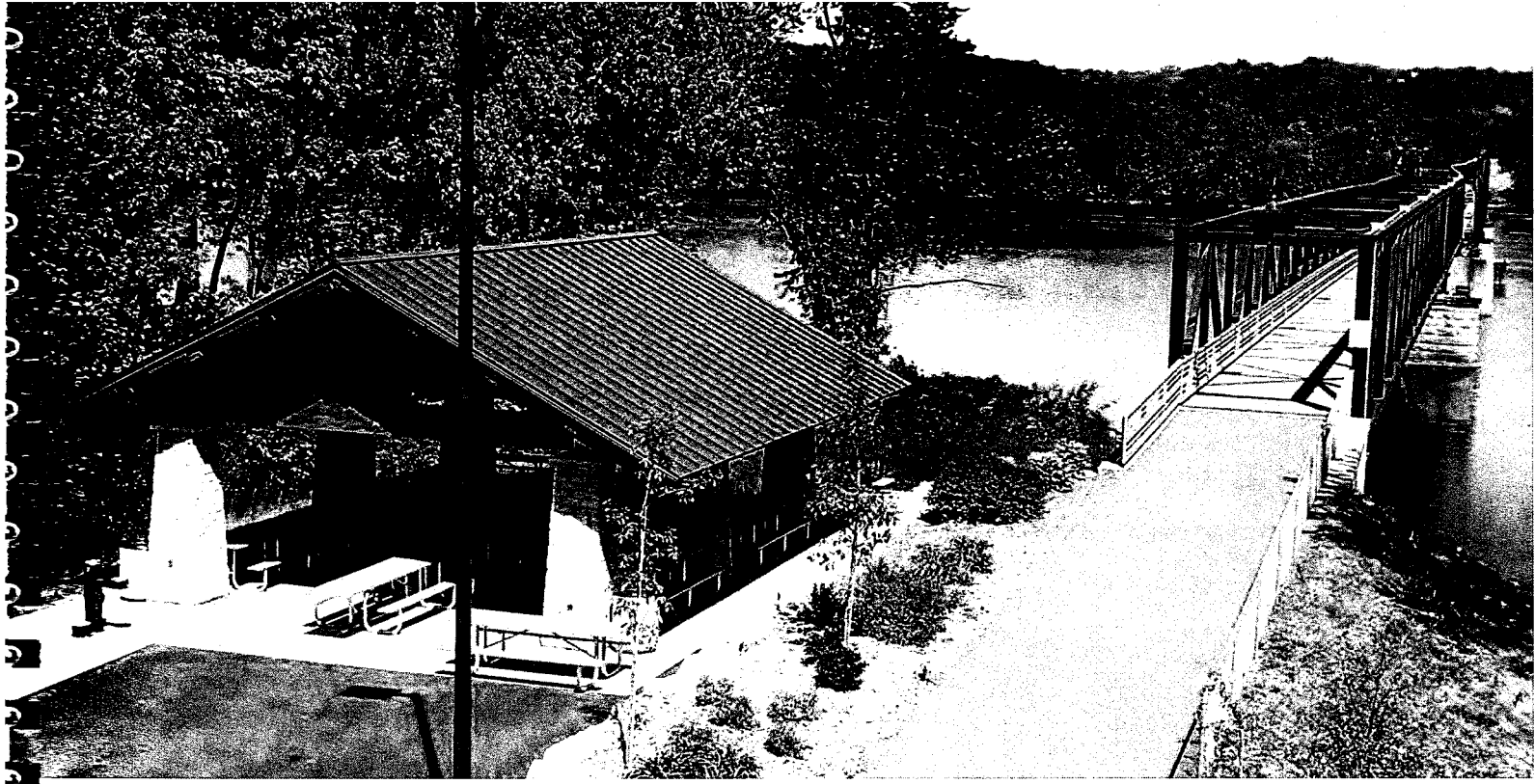
The Position

Under the direction of the City Council, the City Administrator is responsible for overseeing the implementation of the decisions, policies, and goals of the City Council in collaboration with City department directors and their staff. The City Administrator provides overall direction and oversight to department directors to ensure the most effective use of City resources and adherence to City administrative policies and procedures. The City Administrator has ten direct reports: Director of Parks & Recreation, Director of Public Works, Director of Community Development, Police Chief, Fire Chief, Director of Finance, IT Manager, Human Resources Manager, Communications Manager, and City Clerk.

Major duties for this position include:

- Oversees the preparation of meeting agendas.
- Attends City meetings, committee meetings, staff meetings, and meetings with other governmental entities.
- Evaluates projects, programs and services and the impact they may have on the community and City.
- Provides direction, supervision, coordination, and oversight to department directors and administrative personnel.
- Cultivates and sustains an organizational culture that supports and enhances City's values.
- Oversees and directs administrative services of the City including technology, human resources, communications, and City Clerk functions; monitors and develops budgets in collaboration with Finance Director and other department heads/directors.
- Oversees the selection process of department directors and direct reports and makes recommendations to the City Council.
- Serves as an advisor to the City Council and its committees on operational issues, items of concerns, and recommendations.
- Plans, researches, formulates and/or recommends policies, procedures, and proposals for the Council's consideration.
- Oversees and plans the budgetary process and fiscal operations of the City.
- Conducts and performs activities involved in public relations and public information services for the City.
- Establishes relationships and communications with County administrators, County Commissioners, school superintendents, local businesses, associations, and agencies.
- Works with a variety of different groups representing various sectors of the community to identify or discuss their issues, concerns and to represent the City or serve as a liaison between the community, citizens, and the Council.
- Represents the City with local legislators, appointed officials, community leaders, and other city managers or administrators.





Desired Capabilities

The successful candidate will be a leader who is approachable and aligned with the City's values of being ethical (doing the right thing), engaged (delivering collaborative results), and striving for excellence (setting high standards and exceeding expectations). Exercising trust and respect for all, the successful candidate will create an organizational culture that supports and empowers good governance. The successful candidate will understand, respect, and support the role of the City Council while remaining apolitical. The successful candidate will be a critical thinker in evaluating and addressing City needs and problems and receptive to the ideas and perspectives of others. Other desired capabilities include:

- Creative leader who can be a champion for the City and facilitate the community's growth
- Innovative, receptive to new ideas, not content with the status quo
- Connects with the community, proactively reaches out to and engages community groups
- Projects confidence and inspires others to do their best
- Demonstrates the highest level of trust, integrity, and ethics; is transparent in all interactions
- Knowledgeable on issues facing growing communities, relates to the interests of large rural lots and small city lots
- Listens effectively and engages with staff, residents, intergovernmental representatives, other stakeholders, and the City Council
- Invites perspectives, professional opinions, and discussion to make informed decisions
- Motivates and encourages staff performance; ensures that employees understand how their work contributes to organizational goals and objectives
- Sets goals, communicates expectations, and holds staff accountable
- Effective communicator who welcomes questions and responds by providing insight and reasons that explain the response; keeps the conversation focused on best practices
- Fiscally conservative with a strong financial acumen, emphasizes the importance of long-range fiscal planning
- Calm, courteous, and respectful demeanor
- Self-aware and emotionally intelligent
- Approachable and visible in the community, regularly attends community events

Leadership Opportunities

Council-Administrator relationship. The City Administrator will make it a priority to get to know the individual members of the City Council and to work with them collectively to define roles and relationships, to discern priorities, and to help the City Council reach consensus on policy matters. The City Administrator, working with the senior management team, will provide timely information and analysis to the City Council and engage the City Council by providing options and recommendations on policy issues. The City Administrator will ensure that all Council members get the same information at the same time.

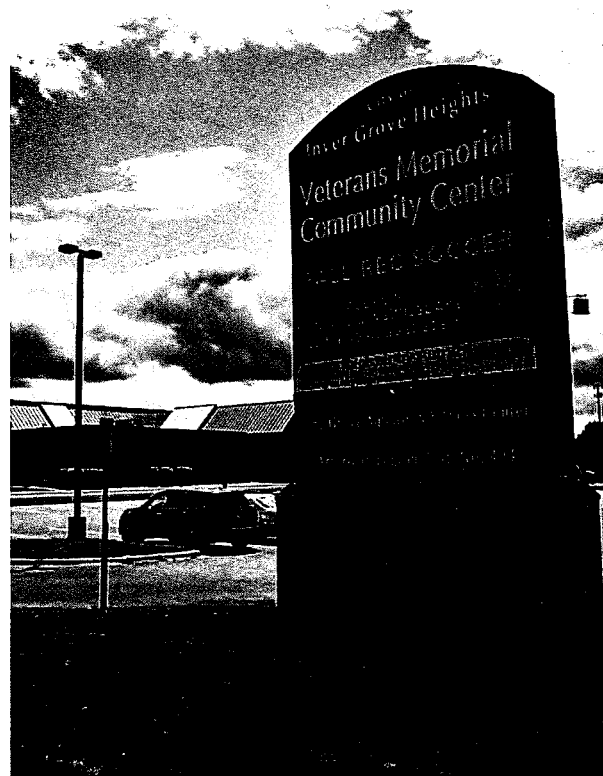
Strategic direction. The City Council has begun work to identify its strategic goals. The City Administrator will work with the City Council and the staff leadership team to develop short- and long-range City goals that are linked to the City budget and long-range financial plans and will provide the leadership and energy to accomplish adopted goals.

Organizational development. The City Council and staff leadership team understand the importance of building a cohesive organization with a forward-looking, shared strategic direction for the City. The City Administrator will cultivate an inclusive organizational environment that values collaboration, teamwork, and respect. With vacancies in the positions of the Directors of Public Works and Engineering and Parks and Recreation, the City Administrator will also have the opportunity to build the leadership team.

Community-building. The City Administrator will establish trusting relationships and regular communications with County officials, school superintendents, and local businesses and connect with groups from various sectors of the community and the general public to represent the City and discuss issues and concerns. The City Administrator will also represent the City in professional, regional, and state organizations.

Economic growth. The City wants to ensure that development and construction processes are streamlined to attract more businesses and developments to help the City realize its untapped potential. The City Administrator will work with the staff leadership team to accomplish the City's goals of improving existing residential neighborhoods, increasing commercial activities, increasing the tax base, and providing additional employment opportunities.

Modernize administrative processes. The City Administrator will engage the staff leadership team to identify areas where efficiencies can be achieved by streamlining business processes and updating technology. As the City grows, the City Administrator will review, and project staffing needs required to support municipal services



Qualifications and Experience

This position requires a Master's degree in public administration or a closely related field and at least five years of management and leadership experience in the areas of finance, government and public administration or an equivalent combination of education and experience. ICMA-CM is a plus.

The successful candidate will demonstrate a proven record of strategic and ethical leadership, a passion for community building, and a collaborative management style. Deep familiarity with the delivery of municipal services and administrative functions, including finance and human resource, is required.



Compensation and Benefits

The 2021 salary range for this position is \$152,131 to \$180,927, and the anticipated starting salary is \$166,529 +/-, depending upon qualifications and experience. The City offers a full range of employee benefits. Relocation is negotiable.

Application and Selection Process

Qualified candidates please submit your cover letter and resume online by visiting our website at:

<https://bakertilly.recruitmenthome.com/postings/2892>

This position is open until filled; first review of resumes occurs on May 26, 2021. Following this date, applications will be screened against criteria outlined in this brochure. For more information or to request accommodations, please contact Sharon Klumpp at sharon.klumpp@bakertilly.com or 651-223-3053.

For more information about the City, please visit <https://www.ighmn.gov/>

The City of Inver Grove Heights is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the City will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.



380 Jackson Street, Suite 300

St. Paul, MN 55101

651-223-3000

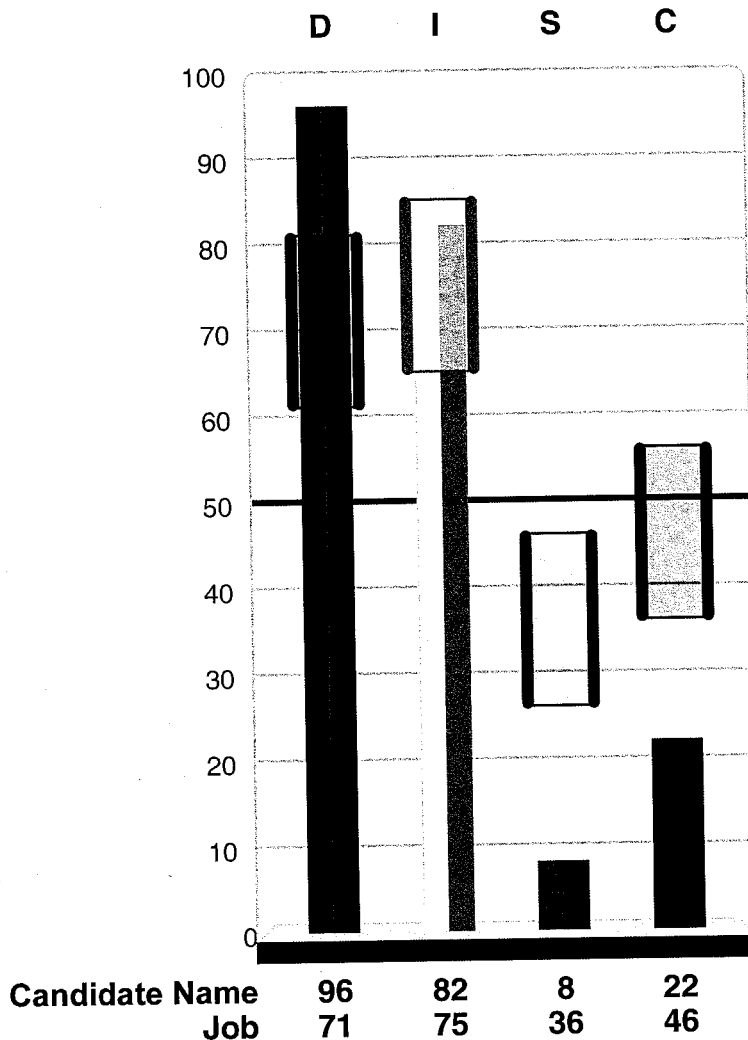
bakertilly.com

Appendix II: sample excerpt of 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.

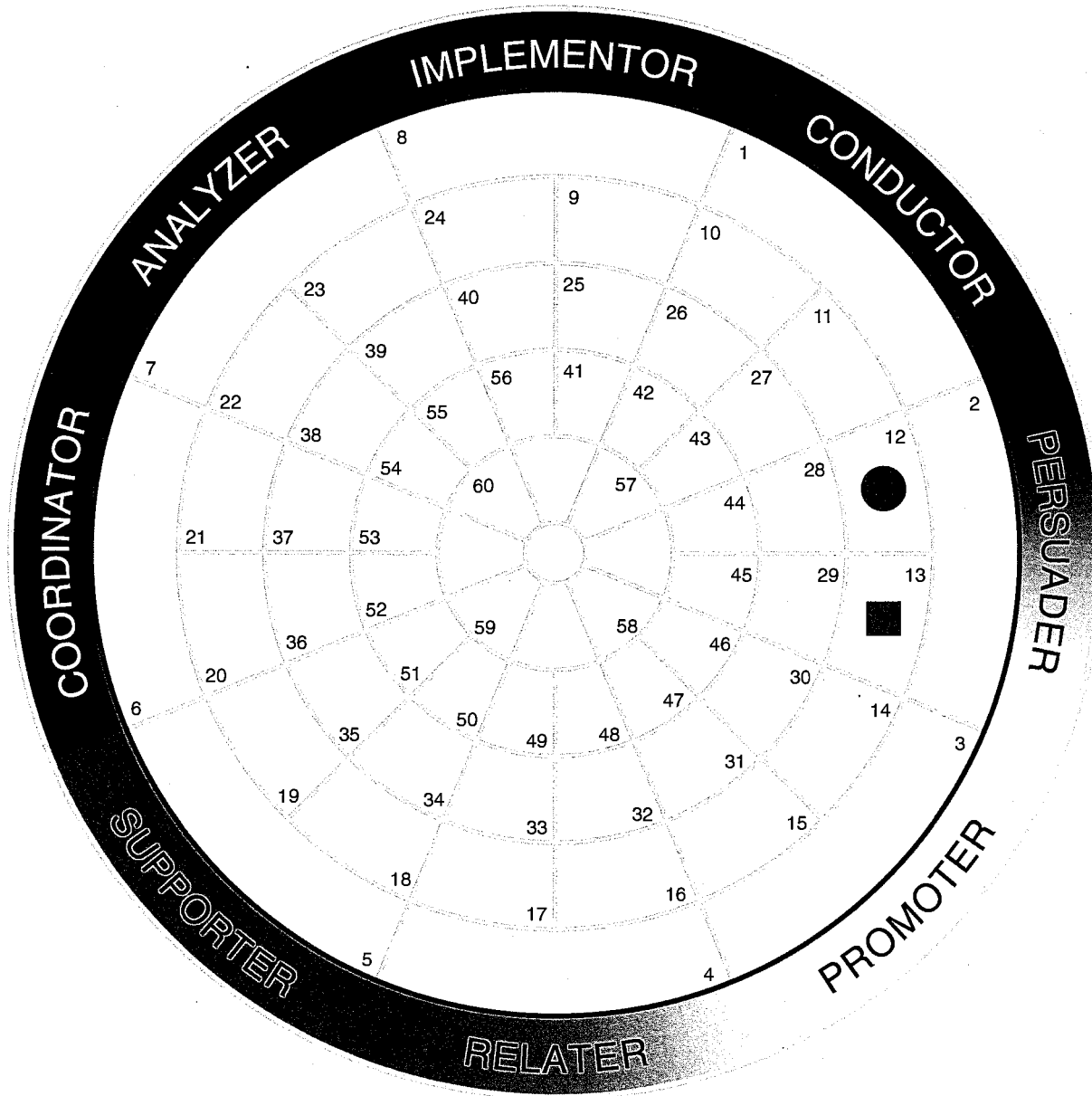


Job Range (20 point range)



TTI SUCCESS INSIGHTS®
DISCOVER • ENGAGE • ADVANCE • PERFORM

The Success Insights® Wheel



- Job - (13) PROMOTING PERSUADER
- Candidate - (12) CONDUCTING PERSUADER



TTI SUCCESS INSIGHTS®
DISCOVER • ENGAGE • ADVANCE • PERFORM

Comparison Analysis For Consulting and Coaching

Job Competencies Hierarchy	Zone Range	Person
1. Customer Focus	91 — 100	50 ☐
2. Teamwork	74 — 100	67 ☐
3. Interpersonal Skills	72 — 92	73 ☐
4. Influencing Others	86 — 100	68 ☐
5. Flexibility	83 — 100	78 ☐
6. Creativity and Innovation	66 — 84	62 ☐
7. Leadership	75 — 93	85 ☐

Primary Driving Forces Cluster	Zone Range	Person
1. Collaborative	35 — 57	6 ☐
2. Selfless	40 — 62	61 ☐
3. Harmonious	35 — 57	0 ☐
4. Receptive	22 — 45	29 ☐

Job Behavioral Hierarchy	Zone Range	Person
1. Competitive	73 — 100	90 ☐
2. Interaction	60 — 84	90 ☐
3. Versatile	54 — 74	100 ☐
4. Frequent Change	52 — 72	92 ☐



Exact match



Fair compatibility



Good compatibility



Poor compatibility



Over-focused