



NORTH BRANCH

—Minnesota—

Kevin Schieber
Mayor

Robert Canada
Councilmember/Acting Mayor

Travis Miles
Councilmember

Kelly Neider
Councilmember

Peter Schaps
Councilmember

**CITY COUNCIL
WORKSESSION AGENDA
TUESDAY, MAY 28, 2024 @ 6:00 PM
CITY HALL, 6408 ELM STREET, NORTH
BRANCH, MN 55056**

1. CALL TO ORDER
2. PLEDGE OF ALLEGIANCE
3. ROLL CALL
4. WORKSESSION ITEMS
 - a. Discussion Regarding Consideration of Request for Proposals for Auditing, Engineering INFO and Legal Services.
 - b. Review and Select Executive Search Firms for City Administrator Recruitment INFO
5. ADJOURNMENT

*******Notice of Participation*******

Mayor Schieber will be attending the City of North Branch Worksession Meeting on Tuesday, May 28, 2024, at 6pm via Phone or Mobile device connectivity, pursuant to Minnesota Statute 13D.021. Mayor Schieber will be either seen and heard at the meeting via electronic (phone or mobile device) and will participate from 1203 Main Street Bandera, TX 78003 763-443-5951, a location open and accessible to the public.

Since we do not have time to discuss every point presented, it may seem that decisions are preconceived. However, background information is provided to the City Council on each Agenda item in advance from Staff and appointed Commissions; and decisions are based on this information and past experiences. In addition some items may also have been discussed preliminarily at Council Work Sessions. If you are aware of information that has not been discussed, please raise your hand to be recognized. Comments that are pertinent are appreciated. Items requiring excessive time may be continued to another meeting.



Prepared By:
Jason Ziemer, Community Development Director
Presenter: Jason Ziemer, Community Development Director
Date: 05/24/2024

Board & Commission: City Council

Subject: Discussion Regarding Consideration of Request for Proposals for Auditing, Engineering and Legal Services.

Overview / Background

As discussed by the City Council at the May 21, 2024 Council Worksession, City staff are providing a draft Request for Proposal (RFP) for auditing services, and sample RFPs from other cities for engineering and legal services. With Council direction, City staff would complete the RFP, including timelines for submittal, review and interviews, and commence the RFP process. My recommendation is for City staff to facilitate this process with one (1) to two (2) participating in the review of proposals and selection of the auditing firm. Final contract for services would be provided to the City Council at a date to be determined.

Sample RFPs for engineering and legal services from other cities are attached for further discussion.

Staff Recommendation

City staff recommends the City Council select recruitment firms for interviews.

Recommended City Council Action

Discuss potential Request for Proposals for Professional Services for Auditing, Engineering and Legal.

Voting Requirements:

INFO



Request for Proposals

Professional Auditing Services

Fiscal years Ending 2025-2029

Proposals Due

July 12, 2024 @ 4:30 pm

RFP Contact

Sharon Wright, Finance Director
sharonw@ci.north-branch.mn.us
651-277-5230

**CITY OF NORTH
BRANCH REQUEST
FOR PROPOSALS**

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**CITY OF NORTH BRANCH
REQUEST FOR PROPOSALS**

I. INTRODUCTION

A. General Information

The City of North Branch (the City) is requesting proposals from qualified firms of Certified Public Accountant to audit its annual financial statements for the fiscal year ending December 31, 2025, with the option, upon mutual agreement, of auditing the financial statements for each of the four subsequent fiscal years. The audit of the City is to be performed in accordance with generally accepted auditing standards. The city may require a single audit in future years of the engagement.

There is no expressed or implied obligation for the City to reimburse responding firms for any expenses incurred in preparing proposals in response to this request. The City of North Branch shall not be liable for any expenses incurred by the applicant including but not limited to expenses associated with the preparation of the proposal, attendance at the interviews, preparation of a compensation (fees) schedule or final contract negotiations.

To be considered, one master hard copy of the proposal must be mailed or delivered to the contact listed below and received prior to the deadline. In addition, email an electronic version of the proposal to the contact below:

City of North Branch
Attn: Sharon Wright
Finance Director
6408 Elm Street
P.O. Box 910
North Branch, MN
55056
651-277-5230 (direct)
sharonw@ci.north-branch.mn.us

The proposal must be received no later than 4:30 PM on July 12, 2024.

The City reserves the right without prejudice to reject any or all proposals submitted. Proposals submitted will be evaluated by a Selection Committee consisting of:

- the City Administrator
- the Finance Director
- the City Accountant
- one council member

During the evaluation process, the City reserves the right, where it may serve the City's best interest, to request additional information or clarifications from proposers, or to allow corrections of errors or omissions. Firms may be requested to make oral presentations to the Selection Committee as part of the final evaluation process.

The City reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the City and the firm selected.

It is anticipated the selection of a firm will be completed by August 13, 2024. Following the notification of the selected firm, it is expected a contract will be executed between both parties following the August 13, 2024, meeting of the City Council.

B. Term of Engagement

A five-year contract is proposed, subject to an annual review by the City. It is anticipated the City will request proposals every five years. In the event of unsatisfactory performance, or when in the best interest of the City, proposals may be solicited before the end of the five-year period. The City reserves the right to provide 90-day notice of the City's intent to terminate the agreement and select a new auditing firm.

C. Subcontracting

No subcontracting will be allowed without the express prior written consent of the City.

D. NATURE OF SERVICES REQUIRED

a. Scope of Work to be Performed

A copy of the City's 2023 Audited Financial Report is available on the City's website <https://www.ci.north-branch.mn.us/departments/finance.php> . The scope of work to be performed will be consistent with the audit performed in 2023.

The City desires the auditor to express an opinion on the fair presentation of its basic financial statements in conformity with governmental accounting principles generally accepted in the United States of America.

For the City, the auditor is required to audit the basic financial statement section and the notes to the financials.

b. Auditing Standards to be Followed

To meet the requirements of this request for proposals, the audit shall be performed in accordance with auditing standards generally accepted in the United States of America; the standards set forth by the American Institute of Certified Public Accountants; the standards for financial audits set forth in the U.S. Government Accountability Office's (GAO) *Government Auditing Standards*, the provisions of the federal Single Audit Act Amendments of 1996 and U.S. Office of Management and Budget (OMB) Circular A-133, and the minimum procedures for auditors of local governments prescribed by the Office of the State Auditor pursuant to Minn. Stat. 6.65.

c. Reports to be Issued

The auditor shall prepare the following reports at the completion of the audit:

- i. Issue an opinion letter on the City's basic financial statements in conformity with accounting principles generally accepted in the United States of America.
- ii. Issue a report on the consideration of the City's internal controls over financial reporting.
- iii. Issue a report on compliance with applicable laws and regulations.
- iv. Communicate in a letter to management any reportable conditions found during the audit.
- v. If a single audit is needed, issue an auditor's report on the internal control over compliance for major federal programs, an opinion on compliance with requirements applicable to each major federal program, and a summary of auditor's results and a schedule of findings and questioned costs, if any, required by OMB.
- vi. Presentation of opinion, procedures, and overview of the City's financial condition to the City Council.

d. Special Considerations

1. The preparation of the City's annual financial report has been substantially completed by the uploading of the City's trial balance into the audit firm's software to produce most of the documents. The City will work cooperatively with the audit firm to complete the notes to the financial statements, and other sections of the report. These fees are to be billed separately from the audit fees.
2. The City will also rely on the expertise of the auditor to inform the City of changes in auditing standards and regulations which may require the auditor to change the scope of work in the future.

3. The City has typically had its audit firm perform non-attestation services to calculate the required entries to record GASB 68 related pension adjustments.
4. The City requires a minimum of ten (10) copies of the annual audited financial report, internal control report, legal compliance report and management letter. In addition, an electronic copy shall be provided of each of these documents.
5. The City prepares and files reports required by the State Auditor's Office for the financial statements. The City has a separate contract that manages the tax increment preparation and reporting requirements.

e. Retention of Work Papers and Access to Working Papers

All working papers and reports must be retained, at the auditor's expense, for a minimum of three (3) years, unless the firm is notified in writing by the City of the need to extend the retention period. The auditor will be required to make working papers available, upon request, to the following parties or their designees: City of North Branch, State Auditor's Office, U.S. General Accounting Office (GAO), Federal Cognizant Agency, and parties designated by the federal or state governments or by the City of North Branch as part of an audit quality review process.

All data relating to the audit, including work papers, will be subject to the same data classifications that apply under Minn. Stat. § 6.715. The auditor conducting a City audit must provide access to such data relating to the audit and is liable for unlawful disclosure of the data as if it were a government entity under Minn. Stat.ch. 13.

In addition, the firm shall respond to the reasonable inquiries of successor auditors and allow successor auditors to review working papers relating to matters of continuing accounting significance.

E. DESCRIPTION OF THE CITY OF NORTH BRANCH

The City of North Branch was organized as a Minnesota Municipal Corporation in 1881. North Branch is located north of the Minneapolis-St. Paul metropolitan area at the intersection of I-35 and highway 95. North Branch's population is just over 12,000 people and the city encompasses an area of just over 37 square miles.

The city operates under the "Optional Plan A" form of government as defined in Minnesota Statutes. Under this plan, the government of the city is directed by a city council composed of an elected mayor and four elected city council members. The city Council is responsible for setting the policy and overall direction for the City, which includes legislative decisions, and approval of the City budget. City employees, under the direction of a City Administrator, carry out council decisions and provide day-to-day services. The City administrator provides leadership,

direction and guidance to all City departments and is accountable to the City Council.

More detailed information on the government, fund structure and operations can be found in the 2023 Annual Financial Report which can be found on the City's website at <https://www.ci.north-branch.mn.us/departments/finance.php>.

The City uses Springbrook financial software with a full range of fully integrated accounting and human resource modules.

Interested proposers who wish to review prior years' audit reports and management letters can find them on the City's website. The City of North Branch will use its best efforts to make prior audit reports and supporting working papers available to proposers to aid their response to this request for proposal. The City and proposers recognize and agree that all actions related to government data must comply with the Minnesota Government Data Practices Act, Minn. Stat. ch. 13.

F. Schedule for Audit Completion

Interim Work & Audit Plan - The City has a standard set of work papers that it prepares each year for the audit. The auditor shall provide City of North Branch an audit plan with a list of additional documentation to be prepared by the City prior to December 15. The schedule for interim work will be determined upon completion of selection process.

Fieldwork & Final Report Due Dates - The City will have its accounting records ready for audit and a draft of the fund statements by the end of March. At a minimum, the auditor will be required to meet the following dates:

1. Fieldwork completion no later than April 15.
2. Draft audit reports & findings to management at least one week prior to presentation.
3. Presentation to City Council at a regular council meeting that falls on the 2nd Tuesday of June.

G. ASSISTANCE TO BE PROVIDED TO THE AUDITOR AND REPORT PREPARATION

a. Finance Department Assistance

Finance Department staff and responsible management personnel will prepare the necessary workpapers and be available during the audit to assist the firm by providing information, documentation and explanations.

b. Report Preparation

The preparation of the City's annual financial report has been substantially

completed by providing the Trial Balance to the auditors for uploading into the audit firm's software to produce the audited financial statements and related documents.

H. PROJECT SCHEDULE

PROPOSAL AND SELECTION TASK	DATE
Request for Proposal Announcement	
Deadline for Questions from Firms @ 4:30 pm	
City Response to Questions	
Proposals Due @ 4:30 pm	
Firm Interviews	
Firm Selected & Contract Approved	
Engagement Letter Executed	

I. PROPOSAL REQUIREMENTS

a. General Requirements

1. Inquiries

Inquiries concerning the request for proposals and the subject of the request for proposals must be addressed in writing to:

Sharon Wright
Finance Director - City of North Branch
sharonw@ci.north-branch.mn.us
6408 Elm Street
P.O. Box 910
North Branch, MN 55056

All responses, questions, and correspondence should be directed to Sharon Wright. In the interest of fairness to all respondents, do not contact other staff or elected or appointed officials.

In the interest of a consistent approach, if the City receives a question or request for clarification from a prospective firm, the City will post its response on the city website with the original RFP. This will allow all potential respondents the same information. Written questions on the RFP will be accepted until Monday, June 24, 2024 at 4:30 PM to allow time for staff to respond in writing to all holders of this RFP. Written questions submitted after Monday, June 24, 2024 at 4:30 PM may go unanswered.

2. Submission of Proposals

The following material is required to be received by July 12, 2024 at 4:30PM for a proposing firm to be considered:

i. Title Page

Title page showing the request for proposals subject; the firm's name; the contact person's name, address and telephone number; and the date of the proposal.

ii. Table of Contents

iii. Transmittal Letter

A signed letter of transmittal briefly stating the proposer's understanding of the work to be done, the commitment to perform the work within the time period, a statement why the firm believes itself to be the best qualified to perform the engagement, and a statement that the proposal is an irrevocable offer for the five-year period.

iv. Detailed Proposal

The detailed proposal should follow the order set forth in Section VII.B. of this request for proposals.

1. Executed copy of the Proposer Guarantees and Warranties (attached to this request for proposal – Appendix A)
2. Schedule of Professional Fees and Expenses for the Audit (attached to this request for proposal – Appendix B)

b. Audit Proposal

1. General Requirements

The purpose of the proposal is to demonstrate the qualifications, competence and capacity of the firms seeking to undertake an independent audit of the City in conformity with the requirements of this request for proposals. As such, the substance of proposals will carry more weight than their form or manner of presentation. The proposal should demonstrate the qualifications of the firm and of the particular staff to be assigned to the engagement. It should also specify an audit approach that will meet the request for proposals requirement.

The proposal should address all the points outlined in the request for proposal. The proposal should be prepared simply and economically, providing a

straightforward, concise description of the proposer's capabilities to satisfy the requirements of the request for proposal. While additional data may be presented, the following subjects, items 2 through 9, must be included. They represent the criteria upon which the proposal will be evaluated.

2. Independence

The firm should provide an affirmative statement that it is independent of the City as defined by the generally accepted auditing standards.

3. License to Practice in Minnesota

An affirmative statement should be included that the firm and all assigned key professional staff are properly licensed to practice in Minnesota.

4. Firm Qualifications and Experience

The proposal should state the size of the firm, the size of the firm's governmental audit staff, the location of the office from which the work on this engagement is to be performed, and the number and nature of the professional staff to be employed in this engagement on a full-time basis and on a part-time basis.

The firm is also required to submit a copy of the report on its most recent external quality control review, with a statement whether that quality control review included a review of specific government engagements.

The firm shall also provide information on the results of any federal or state desk reviews or field reviews of its audits during the past three (3) years. In addition, the firm shall provide information on the circumstances and status of any disciplinary action taken or pending against the firm during the past three (3) years with state regulatory bodies or professional organizations.

5. Partner, Supervisory, and Staff Qualifications and Experience

The proposal should identify the principal supervisory and management staff, including engagement partners, managers, other supervisors, and specialists, who would be assigned to the engagement. Indicate whether each such person is registered or licensed to practice as a certified public accountant in Minnesota. Provide information on the government auditing experience of each person, including information on relevant continuing professional education for the past three (3) years and membership in professional organizations relevant to the performance of this audit.

Engagement partners, managers, other supervisory staff, and specialists may

be changed if those personnel leave the firm, are promoted, or are assigned to another office. These personnel may also be changed for other reasons with the express prior written permission of the City. Other audit personnel may be changed at the discretion of the firm if replacements have substantially the same or better qualifications or experience.

6. Similar Engagements with Other Government Entities

Describe the firm's experience with local government audits and audits of federal programs. For the firm's office that will be assigned responsibility for the audit, list the most significant engagements performed in the last three years that are like the engagement described in this request for proposal. Also, include any cities awarded the GFOA Certificate of Achievement for Excellence in Financial Reporting as this is a future goal of the City. Indicate the scope of work, date, engagement partners, total hours, and the name and telephone number of the principal client contact. Specifically identify those engagements at which the managers and other supervisors who will be assigned to this engagement have worked.

7. Specific Audit Approach

The proposal should set forth a work plan, including an explanation of the audit methodology to be followed. Firms should provide the following information on their audit approach:

- a. Proposed timing and segmentation of the engagement
- b. Level of staff and number of hours to be assigned to each proposed segment of the engagement
- c. Sample sizes and to the extent to which statistical sampling is to be used in the engagement
- d. Extent of use of computer software in the engagement
- e. Type and extent of analytical procedures to be used in the engagement
- f. Approach to be taken to gain and document an understanding of the City's internal control over financial reporting and internal control structure
- g. Approach to be taken in determining laws and regulations that will be subject to compliance test work
- h. Approach to be taken in drawing audit samples for purposes of testing compliance

8. Identification of Anticipated Potential Audit Problems

The proposal should identify and describe any anticipated potential audit problems, the firm's approach to resolving these problems, and any special assistance that will be requested from the City.

9. **The proposal should include acknowledgement of the required audit schedule and a statement as to the firm's ability to meet the schedule.**

c. Dollar Cost Proposal (Appendix B)

1. **Total All-inclusive Maximum Price**

The City will not be responsible for expenses incurred in preparing and submitting the proposal. Such costs should not be included in the proposal.

The dollar cost proposal should specify all pricing information relative to performing the audit engagement as described in this request for proposal. The total all-inclusive maximum price is to include all direct and indirect costs, including all out-of-pocket expenses for each of the years ending 2025-2029.

2. **Rates by Partner, Specialist, Supervisory and Staff Level Times and Hours Anticipated for Each**

The dollar cost bid should include a schedule of professional fees and expenses, presented in the format provided in the attachment (Appendix B) that supports the total all-inclusive maximum price.

3. **Single Audit**

The City does not expect to require a single audit. If this situation presents itself, it will be addressed as an addendum to this contract between the City and the Firm. See section VII.C.4.

4. **Rates for Additional Professional Services**

If it should become necessary for the City to request the auditor to render any additional services to either supplement the services requested in this RFP or to perform additional work because of the specific recommendations included in any report issued on this engagement, then such additional work shall be performed only if set forth in an addendum to the contract between the City and the firm. Any such additional work agreed to between the City and the firm shall be performed at the same rates set forth in the schedule of fees and expenses included in the dollar cost bid.

5. **Manner of Payment**

Progress payments will be made based on hours of work completed during the course of the engagement and out-of-pocket expenses incurred in accordance with the firm's dollar cost proposal. Interim billings shall cover a period of not less than one calendar month.

J. EVALUATION PROCEDURES

a. Selection Committee

Proposals submitted will be evaluated by a Selection Committee consisting of the City Administrator, Finance Director, Accountant, and a council member.

b. Evaluation Criteria

Proposals will be evaluated using three sets of criteria. Firms meeting the mandatory criteria will have their proposals evaluated and scored for both technical qualifications and price. The following represent the principal selection criteria that will be considered during the evaluation process:

1. **Mandatory Elements**
 - a. The audit firm is independent and licensed to practice in Minnesota.
 - b. The audit firm's professional personnel have received adequate continuing professional education within the preceding three years.
 - c. The firm has no conflict of interest with regard to any other work performed by the firm for the City.
 - d. The firm adheres to the instructions in this request for proposal on preparing and submitting the proposal.
 - e. The firm submits a copy of its last external quality control review report, including any letter of comments. The firm must have a record of quality work.
2. **Technical Qualifications**
 - a. **Expertise and Experience**
 - i. The firm exhibits expertise based on past experience and performance on comparable government engagements.
 - ii. The firm has demonstrated an ability to assist its governmental clients in attaining and retaining the GFOA Certificate of Achievement in Financial Reporting.
 - iii. The quality of the firm's professional personnel to be assigned to the engagement and the quality of the firm's management support personnel to be available for technical consultation.
 - iv. Location of the offices performing the work and availability/responsiveness of staff, as derived from the written proposal.

- b. **Audit Approach**
 - i. Adequacy of proposed staffing plan for various segments of the engagement
 - ii. Adequacy of analytical procedures and sampling techniques
 - iii. Ability to meet desired timing of engagement and scheduled deadlines
 - iv. Files are transferred using a secure connection.

3. **Price Consideration**

The cost of the audit for the years 2025-2029 should be calculated on the “Schedule of Professional Fees and Expenses” (Appendix B). Cost will not be the only factor the review committee will use to evaluate proposing firms.

c. Oral Presentations

During the evaluation process, the Selection Committee may, at its discretion, request any one oral firms to make oral presentations. Such presentations will provide firms with an opportunity to answer any questions the Selection Committee may have on a firm’s proposal.

d. Final Selection

The City intends to select a firm based upon the recommendation of the Selection Committee. It is anticipated that the Council will approve the recommended firm on August 13, 2024.

e. Right to Reject Proposals

Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposal unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the City and the firm selected. The City reserves the right, without prejudice, to reject any or all proposals.

APPENDIX A

PROPOSER GUARANTEES AND WARRANTIES

1. The proposer certifies it can and will provide, as a minimum, all services set forth in the proposal.
2. Proposer warrants that it does not have any conflicts of interest with the City of North Branch, its management staff, or its elected officials.
3. Proposer warrants that the firm and all assigned key professional staff are properly licensed to practice in the state of Minnesota.
4. Proposer warrants that it is willing to and able to obtain an errors and omissions insurance policy providing a prudent amount of coverage for the willful or negligent acts, or omissions of any officers, employees, or agents thereof.
5. Proposer warrants that it will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the City of North Branch.
6. Proposer warrants that all information provided by it in connection with this proposal is true and accurate.

Signature of Official: _____

Name (printed/typed): _____

Title: _____

Firm: _____

Date: _____

APPENDIX B

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES FOR THE AUDITS OF 2025-2029 FINANCIAL STATEMENTS CITY OF NORTH BRANCH

Position	Hours	Standard Hourly Rates	Proposed Hourly Rates	Total
Partner		\$	\$	\$
Manager(s)				
Supervisor(s)				
Staff				
Other Positions				
Expenses				
Other Costs				
Subtotal - City Audit				\$
Annual Financial Report Preparation				\$

	Audit of Annual Financial Report	
Fiscal Year Ending December 31,	Total all- inclusive maximum price	Annual Financial Report Preparation
2025	\$	\$
2026		
2027		
2028		
2029		
Total	\$	\$



Request for Proposals

CONTRACTED GENERAL
ENGINEERING SERVICES

Issued November 3, 2023

DEADLINE—Noon
Wednesday, November 29, 2023

CONTACT: DAN UNDEM
CITY ADMINISTRATOR
13292 SYLVANAVE.
Lindstrom, MN 55045
(651) 257-0625
dundem@cityoflindstrom.us
www.cityoflindstrom.us

Introduction

The City of Lindstrom is soliciting proposals from firms interested in providing a wide variety of general engineering services and related technical services. The firm selected will be designated as the City Engineer. The successful applicant will provide these services to the City beginning in January 2024. Services may include, but not be limited, to those listed in the "Scope of Services" part of this document.

The City of Lindstrom shall not be liable for any costs incurred by the firm and/or assigns in responding to this Request for Proposal (RFP), or for any costs associated with discussions required for clarification of items related to this proposal, including any future interviews.

To be considered, one (1) paper copy and one (1) digital copy of a proposal must be received at City Hall 13292 Sylvan Ave. Lindstrom, MN 55045 by Noon on Wednesday November 29, 2023. The City reserves the right to reject any or all proposals submitted.

Questions regarding this request should be directed to Dan Udem, City of Lindstrom, 13292 Sylvan Avenue Lindstrom, MN 55045 and 651-257-0625 or dundem@cityoflindstrom.us. In order to ensure a fair review and selection process, firms submitting proposals are specifically requested not to make other contacts with other City staff, Mayor or Councilmembers regarding their proposals.

During the evaluation process, the City reserves the right to request additional information or clarifications from proposers, or to allow corrections of errors or omissions.

All materials, including but not limited to paper and digital materials, that are prepared, acquired, created, or utilized to fulfill this Request for Proposal and its objectives shall become the property of the City of Lindstrom, where allowed by law. Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the City and the firm selected.

The City of Lindstrom reserves the right to reject any and all submittals, waive any irregularities, reissue all or part of this Request for Proposal, and not award any contract, all at their discretion and without penalty.

Community Profile

The City of Lindstrom, incorporated in 1894, has a mayor elected at large for a two-year term and four council members also elected at large for four-year terms. As the policy-making body of the City, the City Council is responsible for the overall operation of the City. The City Administrator is responsible for carrying out the Council's policies and for the administration of all City business.

The City encompasses about 5 square miles. The City has a population of around 5,000 and is located 35 miles northeast of Minneapolis- St. Paul. U.S. Highway 8 serves as the main entrance road for the community. The City has approximately 28 miles of streets; a water distribution system consisting of 1 water tower, 2 wells and approximately 35 miles of watermain; a sewer system consisting of 26 miles of sanitary sewer main and 18 lift stations; is home to Allmansratt Wilderness Park along with over a dozen city parks throughout the community and has four recreational lakes. The city has both urban and rural areas. More information about the City of Lindstrom can be obtained on our website at www.cityoflindstrom.us

Scope of Services

The City of Lindstrom is searching for a firm that will provide professional services for engineering. The general work elements shall include, but are not limited to:

A. General and Project Management

- Serves as the City's Engineer.
- Takes direction from the City Council and its designated representative.
- Assists in planning, coordinating, supervising and evaluating programs, plans, services, equipment and infrastructure.
- Develops and recommends policies and procedures for effective operation of the City consistent with City policies and relevant laws, rules and regulations and ensures council actions are implemented.
- Assists in evaluating public works needs and formulates short- and long-range plans to meet needs in all areas of Public Works improvements, including streets, water, sewer, storm water, streetlights, parks, and facilities.
- Assist with the Pavement Management Program including the rating of the condition of streets within the city.
- Assists in the implementation of all water resource functions.
- Assists in Capital Improvement Planning
- Provides leadership in the areas of water efficiency, conservation and irrigation storm water reuse.
- Provides engineering services on projects and oversees project management for the construction of municipal public works projects.
- Reviews land use applications and construction plans for private developments for consistency with City adopted engineering specifications, City policies and relevant, laws, rules and regulations and ensures council actions are implemented.
- Ensures that costs and fees are charged back to development projects; works with the City Finance Director to monitor charges and revenues associated with development projects.
- Assists in the planning, layout and design of City parks and trails, pedestrian routes, and other recreational amenities.
- Maintains and updates the City's GIS/technical mapping system.
- Maintains the City's Public Works Work Order system using ArcGIS WorkForce App.

B. Construction Services

- Plan and review construction projects and specifications.
- Monitor the construction process for compliance with codes, regulations, standards and with approved plans; assures financial accountability of private projects as they relate to escrows and letters of credit. Provide advice to the City during performance of construction projects, and shall give consideration and advice to the City during the performance of services, and monitors project budget.
- Prepare, design and/or review construction plans.
- Review bids and/or prepare bid tabulations.
- Perform construction staking and surveying.

C. Preparation of Engineering Reports and Technical Correspondence

- Determine the need for preliminary studies, reviews all preliminary studies for compliance

with ordinances, comprehensive plans, engineering standards and financial guidelines including:

- Feasibility reports
- Construction inspection
- Creates assessment rolls
- Plat review
- Utility studies
- Traffic studies/signalization/signage/forecasting
- State aid reports
- Surface water system analysis and design
- Wetland delineation and mitigation
- Capital Improvement Program studies
- Prepare comments regarding reports, plans and studies of other agencies
- Presents feasibility studies at public meetings

D. City Meetings *(including but not limited to the following)*

- Participates in internal and external meetings involving engineering questions and issues.
 - Participates in weekly staff meetings – Wednesdays at 10:00 a.m.
 - Participates in bi-weekly planning meetings - Mondays at 11:00 a.m.
- Meets with developers and members of the public on proposed development projects to relate the processes and procedures involved with engineering and infrastructure development. Reviews development proposals for conformance with City standards.
- Acts as City liaison and representative with other communities and county, state and federal agencies in areas of responsibility.
- Attends City Council meetings, Council Work Sessions, and other City meetings, as needed. The Council meets on the third Thursday of the month at 7:00 p.m. (subject to change for 2024) with work sessions scheduled as needed.

E. Responds to Constituent Requests and Issues as Directed by Staff

- Performs field inspections
- Addresses constituent concerns personally and in writing
- Be available to the public via phone, email or scheduled meetings during the general business hours of the City of Lindstrom (Mon-Th, 7:00am-4:30pm and Fri 8:00am-12:00pm)
- Makes public presentations
- Provides recommendations to staff and City Council

F. Other Items

- Work with other engineering firms as desired by the City on specific projects.
- Manage and update GIS system and utility records in coordination with Public Works and Planning staff.
- Assist in inventory tracking of public infrastructure through the use of GIS and other means.
- Identify and assist with funding solutions for infrastructure projects such as grant and loan programs and direct legislative appropriations.
- Obtain proper approval and documentation from local, state and federal authorities prior to implementing projects.
- Write grant proposals as directed by City staff and City Council.
- Preparation of transportation, water, sewer and storm water components of Comprehensive Plan update.

Proposal Requirements

The City of Lindstrom expects that, at a minimum, firms must meet the following requirements:

- 1) Be licensed to provide engineering services in the State of Minnesota
- 2) Demonstrate experience with public sector engineering of similar size and scope of the services being requested.
- 3) Assign the City a licensed engineer who has a minimum of five years of experience with municipal engineering projects.
- 4) Be able to provide all of the services listed in the scope of services, either within the organization or by using a sub-consultant.

Interested firms are to submit a written proposal to include information directly related to each of the selection criteria outlined in the Selection Process/Criteria section. At a minimum, proposals should include the following information:

- 1) A written statement of your interest and qualifications including:
 - a. Firm name, address, telephone number and contact person.
 - b. A description of the firm, including brief history, the number of employees and their discipline, philosophy regarding client service, location, years in business, etc.
 - c. A brief description of the scope of similar client relationships,
 - d. The name of the person responsible for the management and administration of the contract and the name of the employee designated as City Engineer, if different, including address and telephone number.
- 2) Resumes of the key personnel who may be assigned to conduct various general engineering service tasks.
- 3) An organizational chart identifying team members and their areas of responsibility.
- 4) Discussion of the firm's specific abilities to provide the required professional services outlined in the Scope of Services.
- 5) Specifically note the services listed in the Scope of Services that will need to be done outside of your organization. List the names of sub-consultants proposed as project team members. Resumes of sub-consultants proposed as project team members.
- 6) Fee schedule, per staff position, which should list the current hourly rate and annual projections thereafter for 2024 through 2028. Ancillary expenses, such as overhead (often expressed as a multiple of direct labor costs), mileage, telephone, Xeroxing, markup for subcontracted services, etc.
- 7) The firm's current and projected workload and its ability to meet schedules including a 2-business day response time to emails and calls from city staff and ability to complete development plan reviews within two weeks. Describe the current workload of the person who would be designated as the City Engineer and what other communities he/she represents.
- 8) Familiarity with the City of Lindstrom.
- 9) Describe the firm's approach to communicate and coordinate projects with the city council, city staff, private developers, residents and the media.
- 10) A description of the firm's philosophy regarding ethics, specifically addressing conflicts of interests. State any potential conflict(s) of interest (i.e. real estate developers, other units of government, etc.) that your firm may have in providing engineering services as outlined in this proposal.
- 11) Three examples of specific knowledge and expertise including project management skills and methodology used to monitor project budgets.

- 12) Provide at least three references from public clients, two of which are from cities of similar size for whom similar services have been performed within the past five years.
- Name of Owner
 - Project Name
 - Contact Person
 - Address
 - Telephone Number
 - Firm's key personnel assigned to the referenced project
- 13) Completed Exercise (see below)

Exercise

As an exercise to assist in the selection criteria, we would like to receive a standard and concise proposal with an estimated number of hours/rates/personnel for each of the following three phases for the hypothetical project described below:

- 1) a feasibility study
- 2) plans and specifications
- 3) field review/inspection on the following hypothetical project.

Proposal Background

The City Council orders a feasibility study for a street project that includes bituminous removal and replacement, replacing bituminous curb with concrete curbing, and localized water main work to repair gate valves and hydrants. The project will be partially assessed to abutting property owners, so the feasibility study must include all necessary documentation for 429 purposes. This includes an assessment roll and estimated assessments for each property. The total project cost for the improvements, including construction and overhead costs, is \$1,000,000.

The consultant presents the project at a Public Hearing. The project is ordered by the City Council, directs plans and specifications to be prepared and bids to be solicited.

The consultant prepares the plans and specifications for City staff review and addresses our comments. Plans are approved by the City Council and bids are solicited.

Bids are received and an excellent contractor experienced in working in Lindstrom is the low bid. There are limited subcontractors and they are also excellent and experienced in working in the City. The project schedule is determined to be eight (8) weeks from start to finish. All work occurs during normal weekday hours. Inspection is generally full time, recognizing that there are days/times when it is not required. Inspection to be provided by a regular full time employee with at least four (4) years of related field experience. The project progresses well and there are no changed conditions or change orders. Partial and final pay estimates are prepared by the consultant, signed by the contractor and presented to the City for processing.

The project concludes and is on budget. Final paperwork is collected by the consultant and provided to the City along with the final pay estimate. A record drawing plan set is provided in both paper and electronic form for the project.

Selection Process/Criteria

Proposals will be reviewed as indicated in the included timetable. City staff will determine which firms are interviewed by the City Council following a review of the proposals submitted.

Schedule of Dates

Date	Description
November 3, 2023	Advertise requests for proposals
November 14, 2023	Conduct Q & A session at 11:00 a.m. for representatives from interested firms (Lindstrom City Hall)
November 29, 2023	Proposals are due to City
December 13, 2023 (tentative)	Council work session to conduct oral interviews with selected firms and direct staff to negotiate contract with selected firm*
January 2024	City Council to approve contract with selected firm

**The oral interview process will consist of each firm responding to five questions that have been provided to each firm in advance of the interview. The period to respond to these five questions will be limited to 20 minutes. Following the 20-minute response to the five questions, follow-up questions, as necessary, will be asked by the City.*

Submission

Submit one (1) paper copy and one (1) digital copy of the proposal indicated in the cover letter, to be entitled "RFP for General Engineering Services" on or before Noon on November 29, 2023 to:

Dan Undem
City Administrator
City of Lindstrom
13292 Sylvan Ave
Lindstrom, MN 55045



CITY OF ARDEN HILLS, MINNESOTA

REQUEST FOR PROPOSALS FOR LEGAL SERVICES – CIVIL AND/OR PROSECUTION June 2023

I. Purpose

The City of Arden Hills is requesting proposals for legal services from firms experienced in municipal law and representation of municipal clients as City Attorney. This request is for both Civil and Prosecution services, interested firms may submit for one or both services.

II. Background

The City of Arden Hills is located in northern Ramsey County, Minnesota. Arden Hills was incorporated on February 14, 1951. The population of the City is 9,939 (2020 Census). The City is approximately 10 square miles in area. The City has I-35W along most of its western boundary and I-694 runs east/west through the center of the City. Most of the northern four square miles of the City, the area north of County Highway 96, is owned by the U.S. Army. The western part of this U.S. Army property, approximately 430 acres, is known as the TCAAP site (Twin Cities Army Ammunition Plant). Excluding the Army property, the City is mostly fully developed.

The City operates under Minnesota Statutes “Plan A” form of government. The City’s governing body consists of a Mayor and four Councilmembers, all elected at large. Councilmembers serve four-year overlapping terms of office, and the Mayor serves a four-year term. Regular City Council meetings are held the second and fourth Monday of each month, with a work session meeting scheduled for the third Monday of each month. The Planning commission meets once a month on the first Wednesday that follows the first Monday of each month.

The City Council is responsible for adopting the City’s budget and tax levy, adopting resolutions and ordinances, all hiring and firing decisions, policy making, development and growth planning, and guiding the overall direction of the City. In addition to providing general government services, the City offers a full range of other services including building and other safety inspections, code enforcement, planning and zoning, parks, street maintenance, snow removal, infrastructure maintenance and repair, and others. The City provides municipal water and sewer services.

The City contracts for Police, Fire, IT, and election services. In addition, the City contracts for legal services for prosecution and civil matters.

III. Scope of General Legal Services

The law firm/attorney(s) are required to be knowledgeable in a variety of legal areas, including but not limited to:

- General municipal laws.
- General laws/statute as relating to municipal prosecution.
- Labor and employment law.
- General state and federal laws relating to municipal government.
- Municipal litigation.
- Zoning, land development, platting, MSA 429 Projects, housing, subdivision, land use law.
- Economic development activities including development, redevelopment, enforcement, and property/real estate law.
- Legal activity relating to general obligation bonds, revenue bonds, and other bonding and financial processes.
- Ordinance and resolution development and interpretation.
- Contract law.
- State rules and regulations that control and manage private utilities in public right-of-way.
- Environmental law.
- Eminent domain.

It is important to note that Arden Hills does utilize a separate bond attorney.

IV. City Attorney Services Requested

City Attorney services, for the purpose of this proposal, shall include those legal services generally understood within the field of municipal law to fall within the category of “general counsel” work, and shall include, but not necessarily be limited to, the following:

- Routine legal advice, telephone and personal consultations with the City Council, City Administrator, and department heads or authorized representatives.
- Assistance in the preparation and review of ordinances, resolutions, agreements, contracts, forms, notices, certificates, deeds, and other documents required by the City. Record documents at Ramsey County and provide original document to the City.
- Advise the City on matters pertaining to labor law and employment law as it relates to personnel matters.
- Represent the City in Court for prosecution of code enforcement, property maintenance, business licensing, and other general prosecution matters normally handled by a municipality.

- Attendance at regular City Council meetings as well as other City Council meetings as requested (usually the second Council meeting of the month).
- Attendance at other board, commission, and committee meetings, upon request.
- Attendance at meetings with City staff, upon request.
- Legal work pertaining to property acquisitions, property disposals, public improvements, easement dedications, and right-of-way vacations.
- Reviewing bonds and insurance requirements required by or for City contracts or activities.
- Provide advice on open meeting law, data practice, records retention, and privacy issues.
- Annually, review the City's data practices manual and recommend updates to remain in compliance with State Statute.
- Preparing deeds, easements, and other documents for recording purposes. Record documents at Ramsey County and provide original document to the City.
- Acquiring easements and public right-of-way through negotiations or the use of eminent domain and in compliance with federal acquisition and relocation regulations.
- Enforcement of City codes, zoning regulations, and building standards through administrative and judicial actions.
- Monitoring of pending and current state and federal legislation and court decisions, as appropriate.
- Coordination of outside legal counsel, as needed and as directed by the City Council and City Administrator.
- Defending the City in all litigation, as requested, except in those cases where insurance companies are required to exclusively provide defense including, but not limited to: (1) human rights claims; (2) condemnation, (3) zoning and land use regulation matters, (4) permits and administrative actions, and (5) labor and employment matters.

V. Required Contents for Proposals

A. Firm Background:

- Brief history of firm.
- Number of attorneys, including number of partners and associates and areas of specialty.
- Support personnel: number and expertise.
- Office location(s).
- Statement of any malpractice claims and/or ethics complaints taken against your firm or firm's attorney(s) over the last five years and the status or outcomes of such action. Indicate whether any action is pending or is currently under review by the State Ethics Board.
- Statement of 2022 billings for municipal work as a percentage of total billings.

B. Attorney Qualifications:

- Identify the specific attorney who will serve as the lead attorney and indicate the following:
 - Academic training and degrees.
 - Description of background and experience.
 - Description of prior municipal experience including cities served in a similar capacity.
 - Identify attorney who will serve in the lead attorney's absence, and provide information as requested in bullet 1 above.
 - Identify other attorneys and support staff who will supply services for which the City will be charged.
- C. List of cities you currently represent and for what type of service.
- D. List of cities you began representing in the last three years and cities you stopped representing in the last three years.
- E. Description of the firm's experience, and the experience of the designated lead attorney, with representing municipal clients in the redevelopment process.
- F. Copy of Malpractice/Liability Insurance Certificate.

VI. Clients/Conflict of Interest

- Indicate whether designated lead attorneys or the law firm represent, or have represented, any client whose representation may conflict with your ability to provide legal services to the City.
- Indicate whether designated lead attorneys or the law firm currently represents any other local units of government having jurisdiction within, or contiguous to, the City of Arden Hills.
- List any and all personal or professional relationships that the proposed lead attorney has with the City Council members or members of the community.
- Indicated whether the designated lead attorneys or the law firm currently represent any real estate developers in Arden Hills or in any municipality contiguous to its borders. If so, please identify those companies or persons in detail.
- Identify what procedures your firm utilizes to identify and resolve conflicts of interest.

VII. Compensation

Firms desiring to be considered for City Attorney services should:

- State the hourly rates for the City Attorney and other attorneys and support staff that may be working on City business.

- Specify if the firm is seeking to provide both civil and prosecution services or only one, and the associated for one or both services. Note, the City uses two different firms currently and may choose to continue with this model or combine with one firm.
- State the rate for meeting attendance, whether hourly or otherwise.
- Identify the minimum increment of time billed for each service, e.g. telephone calls, correspondence, personal conference.
- Define the type and unit rates for reimbursement of expenses such as mileage, reproduction of documents, and word processing charges.

VIII. Professional References

Provide three (3) professional references for the individual designated as City Attorney, including addresses and work telephone numbers. References should be currently employed public agency officials or agents.

IX. Evaluation and Selection Process

The selection committee will be composed of the City Administrator, Assistant to the City Administrator/City Clerk, the Director of Finance, the Director of Community Development, and the Director of Public Works. The qualifications for the top candidates will be verified and references will be checked. In reviewing proposals, the city will carefully weigh the following:

- Depth and breadth of experience and expertise in the practice of law, specifically in those areas most often encountered in municipal government operations.
- Capability to perform legal services promptly and in a manner that permits the City Council and staff to meet established deadlines and to operate in an effective and efficient manner.
- Degree of availability for quick response to inquiries that arise out of day-to-day operating questions or problems.
- Degree to which firm and individual attorneys stay current through continued professional development and active communication with practitioners in the municipal law field.
- Communication skills.
- Cost of services.
- Other qualifications/criteria as deemed appropriate.

The contract will require that the individuals or law firm selected as City Attorney maintain general liability, automobile, workers' compensation, and errors and omissions insurance. The contract will also contain provisions requiring the selected individual or law firm to indemnify the city and provide that the City Attorney is an independent contractor serving at the will of the City Council. Other required provisions will include the City Council's right to terminate the agreement, at its sole discretion, upon the provision of notice.

The City requires compliance with Equal Opportunity regulations and therefore, the firm selected shall not discriminate under the contract against any person in accordance with federal, state, or

local regulation and shall certify to such in their proposal.

The City will not provide reimbursement to anyone for any expense incurred that is associated with the preparation and submission of the proposal and attendance at interviews.

X. Schedule

Law firms or individuals interested in submitting proposals for City Attorney shall submit two (2) complete copies of the proposal, along with a proposed contractual agreement, and a thumb drive containing both documents electronically in a sealed envelope bearing the caption, "Arden Hills City Attorney Proposal". Late proposals will not be considered. All proposals will be deemed confidential and will be retained by the City of Arden Hills. The envelope shall be delivered to:

Dave Perrault, City Administrator
City of Arden Hills
1245 W. Highway 96
Arden Hills, MN 55112

Proposal Due Date and Time: July 7, 2023 11:00 AM

The City reserves the right to reject all proposals, to request additional information concerning any proposal for purposes of clarification, to accept or negotiate any modification to any proposal following the deadline for receipt of all proposals, and to waive any irregularities if such would serve the best interests of the city as determined by the City Council.

In order to ensure a fair review and selection process, firms submitting proposals are specifically requested not to make contacts to the city staff or council members regarding these proposals, but to direct all response and inquiries to the City Administrator or Assistant to the City Administrator/City Clerk.



Prepared By:
Jason Ziemer, Community Development Director
Presenter: Jason Ziemer, Community Development Director
Date: 05/27/2024

Board & Commission: City Council

Subject: Review and Select Executive Search Firms for City Administrator Recruitment

Overview / Background

On April 23, 2024, the City Council authorized a Request for Proposal (RFP) process to select an executive search firm to assist with the recruitment and hiring of a City Administrator. The City directly solicited seven (7) firms and posted the notice on the League of Minnesota Cities marketplace web page and City Web site. Of the seven (7) firms solicited, three (3) provided proposals – Baker Tilly, GMP Consultants and South Central Service Cooperative. The City received three (3) additional proposals from out of state companies. RFPs were emailed to and collected by City Clerk Ragini Varma.

Per the RFP schedule, the City Council was to review RFPs and select executive recruitment firms for interviews. All interviews are to be in-person on Tuesday, June 4, 2024. Interviews are to start at 3 pm, depending on the number of firms selected for interviews.

Staff Recommendation

City staff recommends the City Council select recruitment firms for interviews.

Recommended City Council Action

Review and select executive search firms to interview for City Administrator recruitment.

Voting Requirements:

City staff looking for mutual consent as to firms selected for interview.



May 21, 2024

City of North Branch

Proposal to provide a responsive, well-managed and thorough search process to recruit and identify highly qualified candidates for your next City Administrator

May 21, 2024

Jason Ziemer, Interim City Administrator
City of North Branch
P.O. Box 910
North Branch, MN 55056

Baker Tilly US, LLP
30 East Seventh Street Suite 3025
St. Paul, MN 55101
T: +1 (651) 223 3000
F: +1 (651) 223 3046
bakertilly.com

Delivered electronically jason@ci.north-branch.mn.us

Dear Mr. Ziemer;

This proposal marks the continuation of our valuable relationship with the City of North Branch (the City). Based on what we have learned from you, we are confident we are the right fit to serve you in selecting your next City Administrator with forward-thinking executive recruitment services so you can keep your focus where it belongs: serving your community. Our proposal meets your RFP requirements and describes our unique proposition to meet your key objectives.

We believe that our record of successfully placing qualified and 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 for 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 set us apart. Additionally, we offer the following unique features:

The right firm

North Branch will benefit from the qualifications, technology tools and expansive resources of our top 10 accounting and advisory firm, delivered with personalized attention and responsive service.

The right experience

We are structured around specialized practice groups, allowing us to provide focused training and continuing education to our team members. Our understanding of your organization, paired with targeted public sector executive recruitment experience, will help you thrive now and as you evolve.

The right team

Your handpicked team of Value Architects™ includes technical and industry-specialized team members who understand your organization's needs, challenges and opportunities. You will receive a tailored recruitment approach designed to meet your needs and exceed your expectations.

The right value

We provide high-quality service for a fair and reasonable fee. Our significant level of project team leader involvement translates into a responsive, efficient recruitment and the ability to deliver value throughout the engagement.

- **Customized profile development:** Working with the members of the City Council and designated staff, 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 Administrator. We strive to understand how the City of North Branch's current and anticipated needs and organizational priorities will shape your recruiting and selection requirements. We collaborate with you to develop a nationwide or regional marketing, recruiting and outreach campaign. This approach will effectively allow us to identify, attract and recruit highly qualified candidates for your review.

City of North Branch, Minnesota
May 21, 2024

- **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 potential in each candidate we present to you. Results are “Real,” “Impactful,” and “Powerful.” Furthermore, based on scientific data, these results can provide more profound insights into the candidate’s management traits and leadership styles.
- **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.
- **Online application management:** We use NeoGov as our online application system. It provides for efficient management of applications and allows us to communicate in real time with applicants, engaging and informing them of each step in the search process. Within this system, we can access, review and evaluate prior applicants or individuals who have expressed interest in similar positions. Generally, these individuals may not be actively seeking a job but may be open to “the right opportunity.” This is another benefit and advantage we provide our clients, enabling us to access more passive job seekers.

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 North Branch.

As your Value Architects™, we are determined to support you in achieving your mission to identify your next City Administrator. Thank you for the opportunity to serve you. Our team is excited to earn your trust, and, as always, we look forward to discussing your questions and feedback.

Very truly yours,

BAKER TILLY US, LLP



Anne Lewis, Managing Director

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



Patty Heminover, Director

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Baker Tilly is responsive, interactive and produces the results they say they will. We are very pleased with the services they provide and consider Baker Tilly a leader among accounting and advisory firms.

Controller



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Executive summary

What makes Baker Tilly different from other firms? Our solution truly begins by listening to what the City of North Branch needs.

Understanding your needs to help achieve your objectives and mission

We understand the City of North Branch 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 Administrator.

Baker Tilly public sector executive recruiters will collaborate with you or your designated staff to understand the traits, attributes, capabilities and overall qualifications that are most important to your organization for this recruitment. The information we gather helps us customize colorful and informative marketing, recruitment and outreach strategies, and materials that present the City of North Branch as a thriving municipal organization that is and remains a high-quality community that exceeds the expectations of its residents and visitors. Additionally, we will highlight the City as a family-friendly community with outstanding schools, natural and recreational amenities, well-maintained infrastructure, vibrant business districts and neighborhoods, and provides residents with an excellent quality of life and opportunities for all.

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

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

We take pride in our ability to provide your City Council with comprehensive details and information about each candidate we present, expanding beyond applications, cover letters, and resumes to understand better, compare and contrast individual professional experience, leadership traits and the management style they would bring to your organization. Furthermore, we explore and attempt to understand their motivation for pursuing each career opportunity. We also can provide you with a fully customized interview process to include suggested questions, interview day scheduling and planning as you deem necessary or appropriate. Additionally, the lead consultant is available to the City Council or its designee before, during and after each interview session and can facilitate your deliberations, employment offer, and negotiations with the individual you select as a finalist.

Our highly regarded executive recruitment process

State and local government clients like the City of North Branch are central to our executive recruitment practice, and we apply experience-based insight to help fill your recruitment needs. The following table details how we plan to address your needs in a valuable way.

TASKS	PROCESS
1. Recruitment brochure development and advertising	We schedule and meet with the City of North Branch's City Council, appointed management team members and/or key stakeholders, as instructed, to understand your leadership vision, strategic direction and candidate expectations, then use the information we gather to develop a candidate profile, which will require your input and final approval. We consider the profile our search baseline.
2. Execution of recruitment strategy and identification of quality candidates	- Using your approved profile, we develop a colorful, informative and appealing brochure. Then, we embark on a national or regional targeted marketing, recruitment and outreach campaign to identify individuals who best match your desired profile. - Additionally, we simultaneously launch a direct applicant outreach campaign targeting eligible prospects we identify by building a detailed query into our searchable applicant database. - Using our applicant tracking system, we communicate with all applicants about the process, established timelines and the next steps.
3. Screening of applications, review of semi-finalists and selection of finalists	- Once we identify those applicants who most closely match your desired profile, we assign them several tasks, including our due diligence and candidate questionnaires, while the project team conducts a comprehensive web and social media scan to elicit information that could be relevant to employment and continuation in our process. - We also provide selected applicants with a link that will take them to our one-way video interview portal. The candidates complete a one-way video interview, answering questions designed to give us an additional perspective on each applicant's candidacy related to your desired profile. - Once we gather the responses from the items listed above, we prepare and provide an electronic (PDF) Semi-Finalists Report listing 10 to 12 applicants who best appear to meet your desired profile. This report includes a list of all applicants and copies of resumes, cover letters, due diligence and candidate questionnaire responses. - We then ask you to identify four or five, plus one alternate, as finalists. We then ask this group to complete our management and leadership style assessment, which provides additional information, including development needs, strengths, personality and behavior analysis. This tool provides information about each finalist, which we have found essential to the selection process.
4. Background report checks, reference checks, social media presence, academic verifications	- We secure authorization from each finalist to conduct a comprehensive background records check and reports. - We obtain a list of up to 10 current or former supervisors, peers or direct reports from each finalist to contact as references. - We provide a report summarizing all responses to our customized reference questionnaire. - We verify academic credentials and professional certifications.

TASKS	PROCESS
	- We conduct an exhaustive review of social and electronic media sites and other publications to identify any information relevant to the hiring of the finalists you interview. - We provide a comprehensive reference check and report for each finalist.
5. Final interview process	Once you identify your finalists, we collaborate with your designated staff to design, prepare, and provide technical support to ensure a smooth, effective, and efficient interview process, which may include the scheduling and support for virtual interviews. If requested, we work with the selected finalist and your designated staff to finalize an employment agreement.

THERE ARE NUMEROUS BENEFITS TO UTILIZING BAKER TILLY FOR YOUR RECRUITMENT NEEDS
We strive to distinguish ourselves from peer organizations.

Why Baker Tilly is ideally suited to serve North Branch

Baker Tilly has distinguished itself from public sector executive recruitment peers in many ways. What makes Baker Tilly different from other firms? **Our executive recruitment solution truly begins with your needs.** The City of North Branch deserves to collaborate 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 makes us the right fit to serve the City — today and for years to come.

WHAT WE UNDERSTAND THE CITY NEEDS	HOW WE WILL DELIVER
Carefully structured process supported by technology	- Comprehensive and seamless process refined by years of interaction with local government, not-for-profit employers, and prospective candidates. - Leverage the search process with technology tools, including a video interview system, management/leadership style assessment analysis and online application platform. - Efficient management of candidate information and providing the City Council with unique information about each candidate's leadership and management style and ability to respond extemporaneously to video questions.
Public sector recruiting specialization and experience	- Experienced executive recruitment professionals 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. - Successfully recruited more than 1,700 executive-level positions within cities, counties, school districts and public and not-for-profit organizations since 2000.
Thorough candidate evaluation	- Active recruitment of qualified candidates, drawing from our extensive personal and professional connections with capable individuals, assuring the City of its access to established managers and rising stars. - Thorough evaluation of the final candidates, including detailed information from references and a careful review of background records to ensure sound professional and personal character.

WHAT WE UNDERSTAND THE CITY NEEDS	HOW WE WILL DELIVER
Diversity in executive recruitment	- Committed to diversity in executive recruitment as a reflection of our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. - Ensure diversity is a focus of our recruitment strategy and candidate pools through involvement with the National Forum for Black Public Administrators (NFBPA) and their Corporate Advisory Council, the Local Government Hispanic Network and other organizations.
Delivering value for the City's budget	- Full-service engagement includes advertising, preparation of a recruitment brochure, background, reference, and academic verification checks, and up to three on-site visits. - Work closely to meet the City's needs and any unexpected circumstances that may arise during your recruitment to expedite the recruitment, but not at the expense of finding high-quality candidates.
Triple Guarantee	- Focus on assisting with your executive recruitment until you make an appointment. - Guarantee your executive recruitment for 12 months against termination or resignation for any reason — or we will come back to fill your City Administrator position for no additional professional fee. - Commitment not to directly solicit any candidates selected under this contract for another position while employed with your organization.
Transparency and confidentiality	- No preconceived notions or expectations about the City and prospective candidates. - Work closely with the City to make sure the process is transparent. - Ensure applications are kept confidential, where permitted by state and local laws, to ensure candidates can express interest without jeopardizing current employment to maximize the number of qualified applicants.
Keeping the City involved and minimizing disruption	- Comprehensive process incorporates the active participation of the City Council at key steps in the process. - Keep decision-makers fully advised and informed of all aspects of the process without requiring them to expend substantial time or put aside other pressing issues. - City staff can focus on their primary and assigned functions while Baker Tilly manages the search process.

BAKER TILLY DIFFERENTIATES ITSELF FROM OTHER EXECUTIVE RECRUITMENT FIRMS

North Branch will benefit from our understanding of best practices within the executive recruitment space.

Meeting your needs with our resources

Our firm has the reputation, resources and reach to address the challenges you face as a public sector organization — both now and in the future.

Offering our resources: Baker Tilly at a glance

We dedicate ourselves to delivering efficiency, quality, creativity, innovation and forward-thinking solutions to public sector clients. Baker Tilly is passionate about enhancing and protecting our clients' impact, which is a collective effort by everyone across our firm. **Our public sector team maintains a separate practice group of approximately 350 team members devoted to serving clients like you.** The City of North Branch will receive an exceptional executive recruitment experience. Below are some key facts about our firm.



550+

administration
recruitments



1,700+

recruitments
since 2000



50+

office locations
across the U.S.



250+

workplace and
culture awards

COMPREHENSIVE EXPERIENCE TO SERVE YOU

North Branch will receive support and guidance from a respected firm that continues to grow.

Celebrating more than 90 years serving our valued clients

As a future-looking firm, we celebrate more than 90 years in the marketplace by honoring our roots and continuing to shape our future. We embrace the fact that business can't stand still — and we won't stand still. As we help our clients identify new needs and opportunities, we innovate and change to work better.



Our roots took hold in 1931 in Waterloo, Wisconsin, where we began as a public accounting firm specializing in canning factory audits. Since that time, we have grown with more than 40 different business combinations, each with its own rich history, expanding our presence coast to coast and globally and expanding our scope across industries, services and areas of expertise. One thing has not changed over time: **our shared passion for enhancing and protecting our clients' impact.**

As we reimagine our lasting impact, we remain grounded in our timeless core values. Through dedication, creativity, and adaptability, Baker Tilly will become more connected to our clients, people, communities, and profession.

Project contacts and locations

AUTHORIZED REPRESENTATIVE	ENGAGEMENT TEAM LEADER
Anne Lewis, Managing Director 8219 Leesburg Pike, Suite 800 Tysons, VA 22182 +1 (703) 923 8214 anne.lewis@bakertilly.com	Patty Heminover, Director 30 East Seventh Street Suite 3025 St. Paul, MN 55101 +1 (651) 223 3058 patty.heminover@bakertilly.com

Public sector specialization

Baker Tilly has served local governments since our establishment more than 90 years ago. We are one of the few professional services firms with a state and local government practice dedicated entirely to serving governmental clients.

Unlike many of our contemporaries, Baker Tilly is organized by industry, not service line. What does this mean for North Branch? It means you will be served by a carefully selected team that blends our government-focused professionals with experienced specialists in executive recruitment projects. The City will collaborate with knowledgeable professionals who understand your challenges and provide innovative solutions to help you overcome them.



State and local government is a complex, unique environment shaped by fiscal, regulatory and operational considerations not found in other industries. State and local governments were among Baker Tilly's first customers. Recognizing this complexity and eager to serve as a true **Value Architect™** to the industry, Baker Tilly formalized its dedicated public sector specialization more than **60** years ago.

More than 350 Baker Tilly professionals — including nearly 30 partners and principals — focus directly on serving state and local governments, providing hundreds of thousands of client service hours annually to the public sector. **Our practice serves 4,000 state and local government entities nationwide**, including cities, counties, municipalities, school districts, public utilities and transit organizations. Your team is ready to help you find solutions to the obstacles that stand between you and your goals.

Public sector: Experience that matters



SUPPORTING STATE AND LOCAL GOVERNMENTS WITH SPECIALIZED EXPERTISE

North Branch will benefit from Baker Tilly's insight from serving thousands of public sector clients across the United States.

Sharing a culture of values with the City of North Branch to serve as the foundation of our lasting relationship

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

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

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

Belonging is a core value at Baker Tilly. It is who we are rather than what we do. Each team member commits to upholding a diverse and inclusive workplace driven by fairness, compassion and equality. Inclusiveness and belonging empower us to achieve better business results. Please refer to **Appendix A** for more information on our firm's commitment to diversity, inclusion and belonging.

Organizational management and human capital services

OUR COMBINED SERVICES INCLUDE:

- | | |
|------------------------------------|--|
| • Executive recruitment | • Process improvement |
| • Executive coaching | • Strategic and business planning |
| • Executive performance assessment | • Service sharing and service consolidation |
| • Organization assessments | • Management services |
| • Organization development | • Financial planning, budgeting and analysis |
| • Performance management | |

MEETING NORTH BRANCH'S HUMAN CAPITAL NEEDS

Baker Tilly provides a full array of organizational management and human capital services designed to meet the unique needs of state and local governments.

Serving the City of North Branch effectively from anywhere

Baker Tilly goes to market by industry and service specialization, so we assign team members based on skill set and geographic location. Each team member selected to serve the City will bring individual strengths that directly benefit your engagement. Based on our understanding of your needs, we can provide the best service by managing our relationship with the City out of our St. Paul area office based on a similar experience serving organizations like North Branch.

Your engagement team has the technology tools to support the City in meeting objectives from anywhere. None of this is new to our Baker Tilly professionals. We have led a borderless client service approach for many years and are adept at providing a seamless remote experience for all clients, whether they are down the street or on the other side of the country. Every Baker Tilly professional receives a laptop and remote access credentials to connect to our internal network resources from outside the office.

We leverage Microsoft Teams, our web conferencing software, to host remote meetings. It is almost as good as being in the same room and saves everyone time, cost and carbon footprint. This approach has been very successful for similar clients, and we will make sure it is successful for you.

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



Proactive, ongoing dialogue: Frequent informal conversations, regular status meetings and periodic phone calls as questions arise help us to stay current with your needs and avoid last-minute surprises. As the engagement progresses, we will share findings, ideas and suggestions..



Accessibility and responsiveness, with access to a local office: Responsiveness is at the heart of our relationship, and your team members are committed to responding to most engagement requests within one business day.



Leveraging technology: Baker Tilly invests in innovation and technology tools to support real-time communication – both internally among Baker Tilly team members and with you as our client. Collaboration software tools such as Microsoft Teams allow for remote check-ins and the ability to work together anywhere, anytime and on any device.

Providing executive recruitment services

Our relationship-driven approach is led by an engagement team that delivers a cost-effective, quality engagement for North Branch. We will deliver executive recruitment solutions that address the City's underlying complexities and your unique opportunities.

The Baker Tilly executive recruitment process

Task 1: Kickoff, marketing, recruitment and outreach

Developing a comprehensive recruitment brochure that includes a profile of the ideal candidate is an essential first step in your recruitment process. This profile includes the required academic training, professional experience, leadership, management and personal characteristics related to the candidate's success in the City Administrator position. The recruitment brochure will also include a profile that captures the essence of the City of North Branch as a highly attractive venue for the successful candidate to live and work.

Your recruitment will be national and inclusive in nature, as we pursue a candidate pool of diverse, experienced and talented individuals.

To prepare the recruitment brochure, the engagement team leader will meet with the City Council, City staff and other designated stakeholders to discuss the required background, professional experience, and management and leadership characteristics for your City Administrator. We meet individually (or collectively, depending upon your preference) with members of the City Council to broaden our understanding of the position's leadership and management requirements, current issues, your strategic priorities and expectations for the City Administrator.

Information from these meetings and our review of the job description and other City documents is used to prepare a position and candidate profile. The City will approve the completed profile before recruitment begins. The position and candidate profile will be central to our recruitment strategy and outreach to potential candidates. [See example of a recruitment brochure in **Appendix B.**]

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.

If required, our team will place ads in relevant professional publications, websites and local print media and coordinate with City staff to include information about the search on the City's social media platforms. Baker Tilly also has a high-traffic website with an exclusive location dedicated to encouraging potential candidates to upload their resumes. The aggressive advertising and marketing campaign for top talent will consist of national, state, regional and local elements determined during our initial meetings with the City's representatives. Our customized mailing list, selected from our extensive database and contacts collected at appropriate public-sector conferences, will be utilized to promote the City Administrator position further.

PROVIDING EXECUTIVE RECRUITMENT SERVICES

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Position profile and recruitment brochure development	- Baker Tilly meets with the City to receive information regarding the City'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 City for final approval - Begin advertising and distribution of recruitment brochure	2 weeks

Task 2: Execution of recruitment strategy and identification of quality candidates

Utilizing the information developed in Task 1, Baker Tilly will identify and reach out to individuals who will be outstanding candidates for the position of City Administrator. Often, well-qualified candidates are not actively seeking new employment and will not necessarily respond to an advertisement. However, potential candidates presented with the opportunity directly and in the proper manner may apply. We take pride in locating highly qualified candidates nationwide based on the professional contacts and relationships we have developed and maintained over many years.

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

While recruitment is underway, the engagement team will work with up to 10 subject matter specialists (SMS) who know what successful performance in the City Administrator position looks like to reach a consensus on the ideal candidate's desired leadership and management style. We ask the SMS to complete a 30-minute online questionnaire. When aggregated, these responses generate a benchmark that prioritizes the key competencies, work values and leadership and management style attributes for this position, creating a framework for assessing candidate fit with the City. Later in the process, finalists 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 C.**]

Each candidate submitting a resume is sent a timely acknowledgment 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 professionalism with 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 an interactive, searchable applicant database for recruitment of your City Administrator - Baker Tilly performs direct outreach to prospective candidates identified in the recruitment strategy	4-5 weeks

- Utilization of an extensive applicant database to identify applications and review the applicant pool for competencies/demographics

Task 3: Screening of applicants and recommendation of semi-finalists

During Task 3, the project team screens each application and compares qualifications (education, experience, etc.) and responses to our customized supplemental questions to determine an overall match to your desired profile. We will then narrow the list to 10 to 12 semifinalists for your review and identification of four or five finalists (often including an alternate) or the number of individuals you would like to interview and consider. The finalists will be selected based on written questionnaires, early due diligence information, consultant phone interviews, and recorded and one-way video interviews.

Another unique aspect of our recruitment process is using a web-based one-way video interview. Each finalist has limited time to answer each question, which each applicant sees for the first time when the interview begins. We do not provide questions in advance. Each finalist then has 30 seconds to start responding and up to three minutes to respond to each of about three questions. This tool allows our team to understand better each candidate's ability to "think quickly." The one-way videos also allow us to evaluate the professional demeanor of each applicant. Our team will provide the City Council and the designated staff with a link to review.

You will have access to our Applicant List, 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 candidates identified as semi-finalists • Semi-finalist report is prepared, including the brochure, applicant list, cover letter and resume of candidates to be considered • Baker Tilly and the City Council review video interviews • Project team leader meets with the City Council to review recommended semi-finalists • 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

Task 4: Conducting background checks, reference checks and academic verifications

Once the City Council has identified a list of "finalists," Baker Tilly begins conducting reference checks, background records checks and academic verifications. We then prepare a Confidential Reference Report to complete our research and understanding of each applicant's qualifications, management style, leadership traits or characteristics and professional work performance.

PROVIDING EXECUTIVE RECRUITMENT SERVICES

BACKGROUND CHECKS WILL INCLUDE INFORMATION FROM THE FOLLOWING AREAS:

• Consumer credit	• Bankruptcy
• City/county – criminal	• State district Superior Court – criminal
• City/county – civil litigation	• State district Superior Court – civil litigation
• Judgment/tax lien	• Federal district - criminal
• Motor vehicle driving record	• Federal district – civil litigation
• Educational verification	• Sex offender registry

REFERENCE CHECKS, BACKGROUND RECORDS CHECKS AND ACADEMIC VERIFICATIONS

North Branch will receive a report that thoroughly verifies each finalist's background.

To ensure the overall quality standards of our process, we require a minimum of 10-15 business days between the time you identify finalists for interviews and the time we can provide you with our Final Report.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Design final process with the City for on-site interviews with finalists	Baker Tilly confirms interviews with candidates	1-2 days
Background checks, reference checks and academic verifications	Baker Tilly completes background records checks, reference checks and academic verifications of finalists	2-3 weeks

Task 5: Final interview process

Upon completing Task 4, we will work with your City Council and designated staff to develop the final interview process. We customize the process according to your needs, desired outcomes, position functions, preferences and directives. This may include steps that are important to you, our client. As such, the final interview process may consist of meetings with the department heads and the opportunity for a meet and greet with community members and individual tours of the City. We work with your organization to adjust all aspects of our process as you deem necessary and appropriate.

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

The engagement team leader will be available during the final interview process to answer questions about the candidates and, if requested, assist with the final evaluation of the candidates. If asked, we will help the City Council develop a compensation package and related employment considerations and negotiate an employment agreement.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Final Report prepared and delivered to the City	Final Report is prepared, including brochure, schedule, cover letter, resume, candidate questionnaire, suggested interview questions, candidate assessment form and management style probing questions	1 day

PROVIDING EXECUTIVE RECRUITMENT SERVICES

On-site interviews with finalists	• Interviews are scheduled • The recruitment project team leader attends client interviews and is available to participate during deliberations of candidates if requested	1-2 days
Offer made/accepted	• If requested, Baker Tilly participates in candidate employment agreement negotiations • Baker Tilly notifies candidates of the decision • Baker Tilly confirms the final process; close out items with the City of North Branch	1-2 days

Providing optional post-placement activities

A successful executive search creates an opportunity to solidify the leadership bond between North Branch's elected officials and the new City Administrator. We offer the following fee-based supplementary services to encourage growth and positive change.

SUPPLEMENTARY POST-PLACEMENT SERVICES	
Six-month check-in	A facilitated session allows the new City Administrator and the City Council to discuss progress, goals and vision. It is usually structured as a half-day session and can form the basis for future performance evaluations.
Executive coaching	Coaching can help improve communication, leadership, prioritization and other skills needed for peak performance. It also provides professional and personal counsel to a new manager.
Performance evaluation plan	An annual performance review process led by a third-party facilitator ensures valuable feedback, constructive dialogue and agreement on priorities. It can also strengthen the council/manager relationship.
Management system review	A structured review of the organization's management system identifies ways to increase efficiency and effectiveness. It is especially helpful for new city administrators because it provides an objective agenda for improvement.

We are happy to discuss these services with you and prepare a proposal for any desired services.

Recruiting a diverse candidate pool for the City of North Branch

Baker Tilly's recruiting strategy for North Branch reflects our firm's core values and commitment to diversity, inclusion, belonging and societal impact. Our work begins long before we start collaborating with you to find the right candidate for your City Administrator position. We cultivate relationships with diverse networks of leaders who can bring new perspectives and experiences to the role.

Our firm is a corporate member of the National Forum for Black Public Administrators (NFBPA) and the Local Government Hispanic Network. We serve on NFBPA's National Corporate Advisory Council and regularly participate in its membership events. As in every recruitment, we will call on our established networks to find candidates from a wide range of backgrounds, including those traditionally underrepresented in public sector hiring, and encourage them to consider North Branch's opportunity. Based on our performance record, prospective candidates trust that the Baker Tilly executive recruitment team will fairly consider each application based on their qualifications and the established profile.

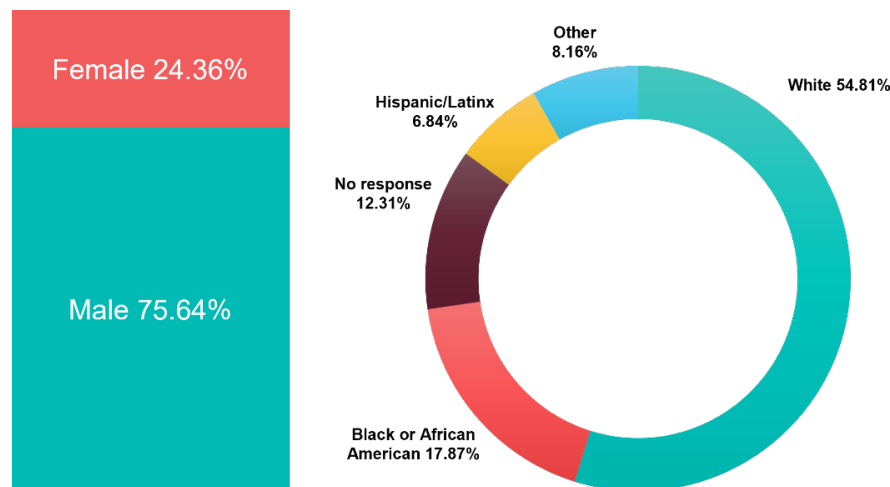
PROVIDING EXECUTIVE RECRUITMENT SERVICES

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, sexual orientation or any other legally protected status. As a leader in the executive recruitment industry, we take positive actions to prevent and remedy any discriminatory effects of business and employment practices.

Recruiting for diversity requires intentional and proactive efforts. These include:

- Advertising job postings that are inclusive and free from bias, using gender-neutral language and avoiding language that could discourage some populations from applying
- Reaching out to a wide range of communities and organizations and using various recruiting channels to help expand the slate of candidates
- Providing a welcoming and inclusive workplace culture within your city to attract and retain diverse talent

This past year, 88% of our applicants provided their race, and 87% shared their gender during the recruiting process. We saw a 1.97% increase in the number of Hispanic/Latinx applicants we presented to clients and a 2.28% increase in female applicants over the same timeframe in 2022. The demographic breakdown of 704 candidates presented was as follows:



DIVERSITY IN RECRUITMENT

As evidenced by positive trends in our applicant diversity data, we are committed to broadening the candidate pool for your position by reaching out to a wide range of communities, organizations and prospective candidates.

Triple Guarantee

We define the success of a smooth, seamless, effective and responsive executive recruitment that culminates with hiring a highly qualified City Administrator who matches the profile we developed to this end. We further define success by identifying and presenting a sufficient number of well-qualified applicants for the City Council to interview.

While we believe in the overall success of our process, we also recognize that unusual circumstances will invariably emerge. This is why we offer a trifold, industry-leading triple guarantee.

1. First, we commit to conducting your recruitment until you have selected a finalist and made an appointment for the fees and tasks quoted in this proposal. If you cannot reach an employment agreement with one of the individuals presented as finalists, Baker Tilly will identify and present a second supplemental group of qualified applicants to consider until you select a finalist.

PROVIDING EXECUTIVE RECRUITMENT SERVICES

2. Second, we guarantee your executive recruitment for 12 months against separation (voluntary or involuntary), which means that if you end the employment relationship (with or without cause) or the finalist resigns (for any reason) we will repeat the executive search at no additional professional fee but will include project-related expenses. Please note that candidates appointed from within your organization do not qualify for this guarantee. Furthermore, this guarantee is subject to further limitations and restrictions of your state laws.
3. Baker Tilly will not directly solicit any candidate selected under this agreement for any other position while the candidate remains in your employment.

Co-developing a timeline to meet North Branch's deadlines

A typical timeline is 100-120 days from project kickoff to extending an offer of employment. The Baker Tilly project team leader will discuss your anticipated or desired timeline during the initial kickoff meeting. We intend to conduct your recruitment expeditiously, but not at the expense of finding qualified applicants to present to you. For this proposal, target dates are to be determined. Once you approve, and based on mutual agreement, we will provide actual dates in our service agreement. The following is an example of a timeline for an executive recruitment process.

EXECUTIVE RECRUITMENT PROCESS BREAKDOWN																			
Project task	Month 1				Month 2				Month 3				Month 4						
1. Profile development, advertising and candidate outreach																			
2. Applicant screening and assessment and recommendation of semi-finalists																			
3. Comprehensive background checks, academic verifications and reference checks completed for finalists																			
4. On-site Interviews with finalists																			
5. Employment offer made/accepted																			

COMMITMENT TO SUCCESSFULLY DELIVER RECRUITMENT SERVICES TO MEET YOUR REQUIREMENTS

North Branch's time is valuable. We will co-develop a timeline to provide the City's executive recruitment services on time.

Your Value Architects™

North Branch will work with a consistent team of Value Architects™ who understand your organization and can add value from day one. The combination of your engagement team's executive recruitment experience and service knowledge translates into tangible results for the City.

Aligning key engagement team members with your goals

Within Baker Tilly, our executive recruitment team consists of ten recruitment consultants and project coordination staff available to meet your executive recruitment needs. Each consultant assigned to your recruitment has experience working with cities, counties, special districts, not-for-profit organizations and school districts, and the many disciplines comprising the City of North Branch organization. Our consultants bring an experienced, participatory and energetic perspective to each engagement. As such, we reflect our unique approach and individualized touch in our internal standard and commitment to outstanding service that meets or exceeds your expectations. Since 2000, our combined consultant team has conducted more than 1,700 executive searches.

1,700+ recruitments

Your engagement team has conducted more than 1,700 successful recruitment projects since 2000.

The Baker Tilly engagement team will collaborate with the City Council and others designated as your technical advisor. As such, we conduct our recruitment process effectively, efficiently, transparently and professionally, consistent with “best practices” in the public sector executive recruitment space. Our agenda is clear; “our agenda is your agenda.” Our objective is to generate a list of highly qualified candidates and assist you with the screening and evaluation of these candidates to identify your next City Administrator.

We have structured the Baker Tilly engagement team to draw upon our 90-plus years of collective service to the public sector and to leverage Baker Tilly's experience and capacity to find exceptional, qualified candidates.

Since its beginnings, our firm has emerged as a leader in human resource management consulting and executive recruitment. Our 45+ years of consulting experience, coupled with our unique approach and personal touch, drives our internal standard for delivering outstanding services and leading-edge results.

Your handpicked team of professionals offers a collaborative focus supported by the breadth and depth of our firm's national resources. We believe in strong personal relationships, which means a personal interest in the City of North Branch from some of our most experienced team members.

Engagement team members are introduced on the following pages, and complete resumes are available in **Appendix D**.

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR NORTH BRANCH

Engagement leadership**Patricia Heminover — Director**

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

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

Consulting team**Art Davis — Director**

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

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

**Yolanda Howze, MPA, IPMA-SCP, SPHR, SHRM-SCP — Director**

205 North Michigan Avenue, 28th Floor, Chicago, IL 60601
 +1 (312) 240.3401 | yolanda.howze@bakertilly.com

Yolanda is a well-regarded, award-winning human resources professional with more than 20 years of public sector human resources experience—primarily in municipal government. Yolanda was assistant to the city manager/director of human resources with the City of University City, Missouri and director of human resources with the City of Bellaire, Texas. Before joining Baker Tilly, Yolanda was a senior consultant II with Gallagher's Human Resources Compensation & Consulting practice. She was responsible for managing projects and providing consulting services to public sector and higher education clients in all aspects of classification and compensation systems and other areas of human resources. As a human resources leader, Yolanda's experience and competencies include full cycle recruiting and retention (including executive recruiting), total rewards and classification administration, performance management, project management, HRIS and process improvement, change management, labor relations, emergency management and disaster recovery, training and organizational development, and safety and risk management. Yolanda earned a

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR NORTH BRANCH

dual Bachelor of Arts in psychology and organizational leadership from Maryville University in St. Louis and a Master of Arts in public administration and policy analysis from Southern Illinois University-Edwardsville. Yolanda is also a Senior Certified Human Resources Professional—SPHR, SHRM-SCP, IPMA-SCP. Her peers selected her as the 2015 Texas Municipal Human Resources Association (TMHRA) Human Resources Professional of the Year.



Anne Lewis — Managing director

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

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



Edward G. Williams, Ph.D. — Director

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

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

Supporting team



Karen Edwards, SHRM-CP — Senior recruitment analyst

+1 (813) 915-5616 | karen.edwards@bakertilly.com

Karen is a senior recruitment analyst with Baker Tilly's executive recruitment practice group. Her responsibilities include assisting in the coordination of executive recruitments. Karen manages outreach, generates reports, conducts detailed background checks and analyzes data to ensure the success of all engagements. She has more than 30 years of experience in human resources, administrative positions and customer service. Karen earned a Bachelor of Science in business administration -

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR NORTH BRANCH

	human resource management from Western Governors University and is a Society for Human Resources certified professional.
	Michelle Lopez — Manager +1 (651) 223 3061 michelle.lopez@bakertilly.com Michelle is a manager with Baker Tilly's executive recruitment practice group. Known for her attention to detail and organizational skills, Michelle is crucial in ensuring that recruitment projects are completed thoroughly and on time. She has more than ten years of experience as a critical support staff member. Her colleagues appreciate her customer service skills and determination to ensure clients and candidates remain informed and engaged throughout the recruitment process. Her responsibilities include organizing assignments and workflows, coordinating information and resources, and identifying, analyzing, and implementing solutions to ensure her team and clients always have the latest recruiting tools at their disposal. She is currently pursuing a Bachelor of Science degree in organizational leadership.
	Diane Segulia — Recruitment analyst +1 (651) 223 3094 diane.segulia@bakertilly.com Diane is a recruitment analyst with Baker Tilly's executive recruitment practice group. She is a team player who prides herself on delivering high-quality work. Diane joined Baker Tilly in 2015 as the receptionist. She joined the executive recruitment practice group as an administrative assistant in October 2019 and began her role as a recruitment analyst in June 2022. Her responsibilities include conducting research for the consultants, completing background checks, coordinating information and resources, and collaborating with candidates and clients through all phases of an executive recruitment.
	Carrie Thompson — Recruitment analyst +1 (703) 923 8040 carrie.thompson@bakertilly.com Carrie is a recruitment analyst with Baker Tilly's executive recruitment practice group. She has more than four years of experience in recruiting coordination, including interview scheduling and candidate communication. She facilitates smooth sailing during the recruitment process. Carrie runs reports, coordinates outreach and organizes essential documents. Along with her work behind the scenes, she collaborates with clients and candidates to help them on their journey to success. Carrie earned a Bachelor of Arts in communication with a concentration in media production and criticism from George Mason University.

NORTH BRANCH WILL RECEIVE TANGIBLE RESULTS WITH BAKER TILLY

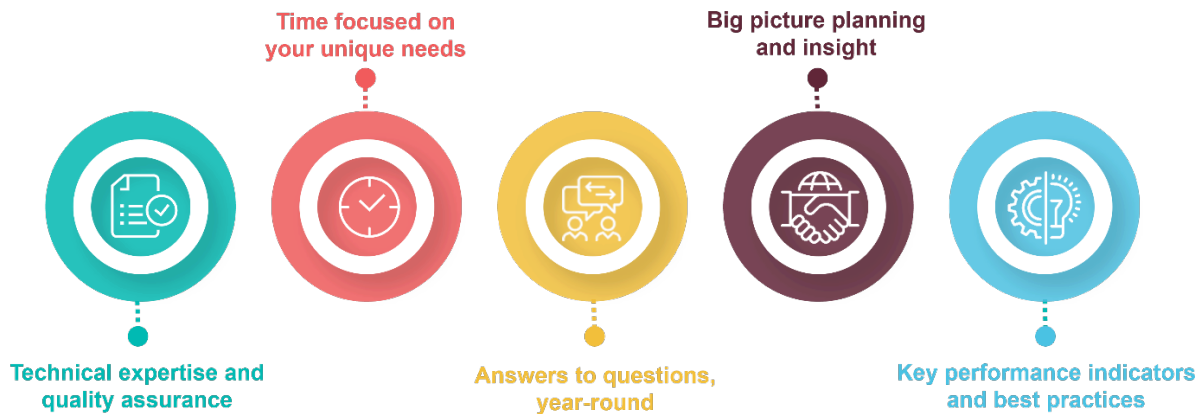
All engagement team members are committed to North Branch's success. Their public sector experience and service expertise translates into tangible results for the City.

Building trust with our client-focused approach to staffing to demonstrate how important you are to our firm

The City of North Branch will benefit from our unique approach to staffing, which emphasizes significant engagement leadership involvement throughout the entire engagement process. Unlike other firms, Baker Tilly provides our top staff and most experienced team members to serve your organization. You can expect an open line of communication with and access to your senior team leaders year-round. This promotes an efficient, effective engagement.

We will be responsive to your needs, quickly resolve challenges and build trust. You can expect to receive technical insights and an approach customized to your unique structure, culture, timing and strategic goals.

The graphic below details how we will build trust with North Branch.



COLLABORATING WITH YOU AS YOUR TRUSTED TEAM

Your engagement team will be deeply involved in the engagement and develop an in-depth working knowledge of North Branch and processes to deliver value throughout our relationship.

Cultivating an engaging culture to offer a consistent public sector team that will serve you for many years

We view our commitment to staff continuity as the cornerstone of building a lasting relationship with North Branch. You can expect to see the same engagement team members for additional recruitment services in the future.

Exceptional professionals thrive at Baker Tilly because we foster an engaging culture through diversity and inclusion, work-life balance, continuous learning opportunities, career advancement and employee recognition. As evidence of our team member-focused culture, Baker Tilly proudly presents a variety of recognitions and awards.

EVIDENCE OF OUR TEAM MEMBER-FOCUSED CULTURE AND COMMITMENT TO EXCELLENCE

Baker Tilly was included in **People Magazine's 2022 Companies That Care** list, which recognizes companies who put their employees and communities first



Ranked as a **top 10 accounting and advisory firm for workplace prestige and quality** on Vault Accounting's Accounting 50 list; **culture** is the number one reason that team members join our ranks and stay at our firm



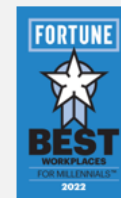
Recognized as **one of America's Best Large Employers** in 2021 and 2022 by Forbes



Baker Tilly has again been certified as one of the **Best Workplaces in Consulting and Professional Services** – one of only 25 companies recognized on this list



Received **250+ culture awards and workplace recognitions** firmwide



CULTIVATING AN ENGAGING CULTURE

Our commitment to attracting and retaining a top-quality workforce benefits North Branch through engaged team members and staff continuity.

Valuable perspectives

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

Demonstrating successful relationships with similar clients

Patty Heminover is the designated project leader for your City Administrator executive search. We encourage you to connect with the clients below to learn more about the value of their relationship with Baker Tilly and to verify the quality of work we have consistently delivered to each client as part of these recently completed executive recruitment projects. Each client will offer a unique perspective as you consider your own needs.

LEAGUE OF MINNESOTA CITIES			
Name	Donyelle Mikacevich	Title	HR Manager
Phone	+1 (651) 281 1202	Email	dmikacevich@lmc.org
Services	Recruitment of Executive Director, HR Director, and Deputy Administrator		

CITY OF BEMIDJI, MINNESOTA			
Name	Jorge Prince	Title	Mayor
Phone	+1 (218) 407 7312	Email	Jorge.prince@ci.bemidji.mn.us
Services	Recruitment of City Manager		

CITY OF COLUMBIA HEIGHTS MINNESOTA			
Name	Kelli Wick	Title	HR Director
Phone	+1 (763) -706-3608	Email	kwick@columbiaheightsmn.gov
Services	Recruitment of City Manager & Police Chief		

PROVIDING VALUABLE PERSPECTIVES FROM CURRENT CLIENTS

At Baker Tilly, relationships matter. Our Value Architects™ have a record of successfully enhancing and protecting similar clients' impact — resulting in experience-based insights for North Branch.

Providing similar services to clients

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

LIST OF RELEVANT PROJECTS: PRESENT — 2019				
Year	Client	State	Project	Pop.
Current	Carrboro	NC	Town Clerk	21,230
Current	Carrboro	NC	Town Manager	21,230
Current	Columbia Heights	MN	City Manager	21,961
Current	Corpus Christi	TX	Assistant City Manager	323,733
Current	Denton	TX	City Secretary	136,195
Current	Lexington	VA	City Manager	7,400
Current	Manassas	VA	City Manager	42,668
Current	Marceline	MO	City Manager	2,123
2023	Belle Meade	TN	City Manager	2,912
2023	Beloit	WI	City Manager	36,657
2023	Bemidji	MN	City Manager	14,570
2023	Carrboro	NC	Assistant Town Manager	21,230
2023	Fargo	ND	City Administrator	121,889
2023	Fernley	NV	City Manager	22,343
2023	Freeport	ME	Town Manager	8,737
2023	Greenbelt	MD	City Manager	24,921
2023	Highland Park	TX	Town Administrator	8,993
2023	Huber Heights	OH	City Manager	43,439
2023	Midland	TX	City Manager	132,520
2023	Morehead City	NC	City Manager	9,556
2023	Perrysburg	OH	City Administrator	21,730
2023	Portland	ME	City Manager	66,595
2023	Spartanburg	SC	Assistant City Manager	38,732
2023	Warrenton	VA	Town Manager	10,057
2023	West Fargo	ND	City Administrator	38,626
2023	Wyoming	MI	City Manager	76,501
2022	Apex	NC	Assistant Town Manager	58,780
2022	Beaumont	TX	City Manager	118,428
2022	Belton	MO	City Manager	23,480
2022	Blue Springs	MO	City Administrator	54,850
2022	Branson	MO	City Administrator	10,000
2022	Brevard	NC	City Manager	7,900
2022	Buda	TX	City Manager	15,108
2022	Denton	TX	City Manager	136,195
2022	Evans	CO	City Manager	22,165
2022	Golden	CO	City Manager	20,399

LIST OF RELEVANT PROJECTS: PRESENT — 2019

Year	Client	State	Project	Pop.
2022	Harrisonburg	VA	City Manager	54,033
2022	Hastings	NE	City Administrator	25,152
2022	Hutchinson	KS	City Manager	40,006
2022	Joplin	MO	Assistant City Manager	50,386
2022	Kinston	NC	City Manager	20,083
2022	La Marque	TX	City Manager	16,627
2022	Minnetrasta	MN	City Administrator	7,621
2022	Oak Hill	TN	City Manager	4,587
2022	Oakland	CA	Deputy City Administrators	440,646
2022	Overland Park	KS	City Manager	191,278
2022	Plain City	OH	Village Administrator	4,065
2022	Port Arthur	TX	Assistant City Manager	53,937
2022	Salisbury	NC	City Manager	33,727
2022	Shorewood	MN	City Administrator	7,974
2022	Spicer	MN	City Administrator	1,188
2022	Staunton	VA	City Manager	25,750
2022	Westminster	CO	City Manager	116,317
2022	Willmar	MN	Assistant City Admin/City Operations Director	19,628
2021	Carrboro	NC	Town Manager	21,230
2021	Clearwater	FL	City Manager	115,159
2021	College Park	MD	City Administrator	32,196
2021	Corpus Christi	TX	Assistant City Manager	323,733
2021	Evansville	WI	City Administrator/Finance Director	5,378
2021	Grand Rapids	MI	Deputy City Manager (limited)	192,294
2021	Greeley	CO	City Manager	105,888
2021	Inver Grove Heights	MN	City Administrator	34,344
2021	Kimball	NE	City Administrator	2,578
2021	Long Grove	IL	Village Manager	7,956
2021	Louisville	CO	City Manager	20,860
2021	Moline	IL	City Administrator	41,902
2021	Riverside	OH	City Manager	25,093
2021	Rockville	MD	Deputy City Manager	66,940
2021	Shakopee	MN	Assistant City Administrator	40,731
2021	Sidney	OH	City Manager	20,590
2021	Stonecrest	GA	City Clerk	54,202
2021	Woodlawn	OH	Village Manager	3,365
2020	Clayton	OH	City Manager	13,269
2020	Fairmont	MN	City Administrator	10,126
2020	Front Royal	VA	Town Manager	15,239

LIST OF RELEVANT PROJECTS: PRESENT — 2019

Year	Client	State	Project	Pop.
2020	Herington	KS	City Manager	2,304
2020	Kansas City	MO	City Manager	488,943
2020	Lake Ozark	MO	Asst City Admin/Community Eco Dev Director	1,792
2020	Maple Plain	MN	City Administrator	1,807
2020	Matanuska-Susitna Borough	AK	Borough Manager	108,317
2020	Middletown	OH	City Manager	48,121
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	Springdale	OH	Assistant City Administrator	11,223
2020	St. Joseph	MO	City Manager	74,959
2019	Beeville	TX	City Manager	12,937
2019	Cloquet	MN	City Administrator	11,938
2019	Forest Park	OH	City Manager	18,723
2019	Hobbs	NM	City Manager	37,764
2019	Lake Lotawana	MO	City Administrator	2,099
2019	Minerva	OH	Village Administrator	3,640
2019	Norman	OK	City Manager	122,843
2019	Paris	TX	City Manager	24,800
2019	Park City	KS	City Administrator	7,499
2019	Port Arthur	TX	City Manager	53,937
2019	Santa Fe	NM	City Manager	83,776
2019	Willmar	MN	City Administrator	19,628

Value for fees

Value means more than simply checking boxes and meeting your requirements. Value means services that lead to meaningful insights, help improve efficiencies and direct more dollars and resources to achieving the City of North Branch's mission.

Delivering a professional fee estimate for the City of North Branch

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

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

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

Feel free to direct all questions regarding the professional fee and project-related expenses to Patty Heminover via email at patty.heminover@bakertilly.com or via phone at +1 (651) 223 3058.

PROPOSED SERVICES	
Phase I	
Task 1 — Candidate profile development/advertising/marketing	
Task 2 — Identify quality candidates	
Phase II	
Task 3 — Screening of applications and submission of recommended semi-finalists to the client	
Task 4 — Reference checks, background checks and academic verifications	
Phase III	
Task 5 — Final process/on-site interviews with finalists	
Conclusion	
Assistance and technical support for total rewards (salary and benefits), employment offer negotiation, offer and acceptance by finalist	
TOTAL ALL-INCLUSIVE FEE*	\$26,000
OPTIONAL SERVICES FOR CONSIDERATION	
At your request, Baker Tilly can conduct a web-based community survey to help your organization identify critical issues or priorities that your organization may consider as you launch an executive search. Depending on your need, we administer the survey, which	\$1,650

your residents, community leaders, employees or designated key stakeholders may complete. Please note that this type of survey may alter the overall project timeline.

On rare occasions, a client desires the delivery of additional search-related services from the Baker Tilly executive search team. Services not included in the proposed scope of services include additional visits to your organization by the project team leader. Baker Tilly will bill North Branch at an hourly rate of \$300, plus expenses for additional work requested explicitly by your organization outside this project's scope or as described in the proposed scope. Before beginning these services, Baker Tilly will prepare and submit a written explanation of the additional services requested and the estimated number of hours required before commencing any additional services.

\$300 per hour plus expenses

BAKER TILLY CAN PROVIDE OPTIONAL SERVICES

North Branch may benefit from the additional services we offer. No additional services will be billed without the express consent and agreement with the City.

Negotiations

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

Supporting the City of North Branch with our value-for-fees approach

We will provide the highest quality service for a fair and reasonable fee. Below is an overview of our value-for-fees approach and how it benefits you.



COMMITMENT TO VALUE FOR FEES

North Branch can expect exceptional service paired with a fair, competitive fee arrangement that allows us to deliver continuous value throughout our relationship.

Appendix A: Prioritizing diversity, inclusion, belonging and societal impact (DIBS)

Prioritizing diversity, inclusion, belonging and societal impact (DIBS)



**MEET SHANE LLOYD,
DIBS STRATEGY LEADER**

In his role as chief diversity officer at Baker Tilly, Shane oversees our company's DIBS initiatives and serves on influential national diversity and inclusion boards.

At Baker Tilly, DIBS is who we are rather than simply what we do. We celebrate and value the identities, perspectives and contributions of every person. As we empower our team members to grow and bring their talents to the table, we discover opportunities to achieve better results for North Branch. We hire people who bring new perspectives and experiences, including our Chief Diversity Officer, Shane Lloyd, who joined Baker Tilly as DIBS strategy leader in 2021.

Baker Tilly's DIBS steering committee is designed to strengthen our firm's culture of diversity, inclusion and belonging. This cross-section of leaders across our firm oversees our strategy — from inclusion-related communications to accountability measures for our key diversity goals and coordination of our DIBS ecosystem.

Our new, ambitious goals center around our structural pillars of diversity, inclusion, belonging and societal impact — embedding this work ever more deeply into the day-to-day workings of our business. Our DIBS ecosystem includes an array of groups, initiatives and deep networks of committed team members. [Learn more here.](#)

DIBS communities and signature initiatives

Activate team member network



Our core value of belonging reflects our commitment to creating a diverse and inclusive workplace for everyone. Bolstering this core value is Activate, our newest team member network. Activate's mission is to unite and empower team members who are neurodiverse or have physical disabilities to reach their full potential and contribute to a more accessible workplace.

Growth and Retention of Women (GROW)



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

NexGen: Joining workforce generations



With NexGen, we aim to empower the next generation of team members to collaboratively engage in our firm's progress while promoting an overall investment in our future.

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.

Supporting Opportunity, Advancement and Recognition (SOAR)



SOAR focuses on improving inclusion and increasing retention of team members of color to create a more inclusive, innovative and productive workforce. Within SOAR, our team member-led Black, Latinx and Asian American and Pacific Islander (AAPI) communities provide spaces for conversation, relationship-building and engagement.

Baker Tilly Foundation



As a firm, we have made our position clear: We stand against racism and discrimination in any form. Our Baker Tilly Foundation supports causes within key pillars, including human services organizations that advance well-being, equity and inclusion.

Appendix B: Sample brochure



CITY MANAGER

CITY OF BEMIDJI, MINNESOTA

First Review of Applications: August 17, 2023

THE COMMUNITY

Bemidji (est. pop. 15,575), located in northern Minnesota, is a captivating city that seamlessly blends natural beauty, cultural richness, and a warm community spirit. Bemidji, a regional center and the county seat for Beltrami County, services a nearby population of nearly 50,000 people. Nestled on the shores of Lake Bemidji, the City offers stunning views of pristine lakes, lush forests, and serene landscapes. It is famous for being the home of the iconic statues of Paul Bunyan and Babe the Blue Ox, which stand tall as symbols of the region's logging history. Bemidji offers an abundance of outdoor activities. Whether it's fishing in the crystal-clear waters of Lake Bemidji, exploring the numerous hiking trails in the nearby state parks, or enjoying a leisurely boat ride, nature lovers will find themselves in paradise. Bemidji also embraces a vibrant artisan community, where boundless creativity flourishes within galleries, along downtown streets, and during captivating showcase events held throughout the year. The City's downtown area is a charming mix of boutiques, art galleries, and restaurants, providing a vibrant cultural scene. Additionally, Bemidji is renowned for its deep-rooted Native American heritage and is centrally located amongst three of Minnesota's largest Anishinaabe nations: Leech Lake Band of Ojibwe, Red Lake Nation, and White Earth Nation.

Bemidji is home to a well-regarded school district and charter schools that provides quality education to its students. The Bemidji Area Schools (ISD 31) serves the City and surrounding areas and is committed to providing a nurturing and inclusive learning environment where students can thrive academically, socially, and emotionally. Bemidji schools offer a wide array of academic opportunities, including advanced placement (AP) courses, college readiness programs, and career and technical education options. Students can explore various interests and talents through extracurricular activities such as sports teams, clubs, music, arts, and theater programs. The district also emphasizes the importance of community involvement, encouraging students to participate in service-learning projects and community service initiatives. In addition to its exceptional K-12 education, Bemidji is proud to house the distinguished Bemidji State University, the sole university in Northwest Minnesota, and Northwest Technical College. These esteemed post-secondary institutions serve as foundational pillars for the city, offering valuable opportunities for higher education and career advancement.

Bemidji offers a warm and welcoming community, highlighting Minnesota's natural beauty and small-town charm. With a tight-knit community, friendly residents, and vibrant downtown area, it fosters a strong sense of belonging. Bemidji's supportive environment and celebration of its unique identity make it an appealing place to call home.



THE ORGANIZATION

The City of Bemidji is a Home Rule Charter City with a Council-Manager Plan. The City Council, elected by the residents, serves as the legislative body, establishing policies, ordinances, and approves budgets. The City Manager, appointed by the City Council, is the head of the administrative branch and is responsible for the administration of all City affairs.

The City employs a total of 129 full-time equivalent employees, of which approximately 100 are represented by labor unions. Additionally, there are approximately 150 part-time and seasonal employees. The City holds an A1 Moody's credit rating, and has a 2023 annual budget of \$63 million.

Click [here](#) to view Bemidji's organizational chart.

THE POSITION

The City Manager, receiving direction from the City Council, acts as the chief administrative officer for the City; directs, manages and evaluates City operations, services and staff according to established ordinances, policies, and procedures of the Council, City Charter and Minnesota law; advises the City Council on sound public policy and staffing to ensure the effective and timely delivery of City services; and ensures laws, ordinances, and resolutions of the City are enforced.

The successful City Manager candidate provides leadership and direction in the development of short and long range plans; gathers, interprets, and prepares data for studies, reports, and recommendations; and coordinates department activities with other departments and agencies as needed.

Responsibilities include:

- Manages and supervises all departments, agencies, and offices of the City to achieve goals within available resources; plans and organizes workloads and staff assignments; trains, motivates, and evaluates assigned staff; reviews progress and directs changes as needed.
- Continually evaluates results being achieved as the basis for counsel, guidance, and recommendations to the Council relative to level of services, projecting fiscal needs, bonding requirements, etc.; establishes organizational and planning priorities with the Council to achieve established objectives; manages the City for not only fiscal soundness, but also for long term economic and environmental impacts on the community.
- Assures that assigned areas of responsibility are performed within budget; performs cost control activities; monitors revenues and expenditures in assigned area to assure sound fiscal control; prepares annual budget requests; assures effective and efficient use of budgeted funds, personnel, materials, facilities, and time.
- Issues written and oral instructions; assigns duties and examines work for exactness, neatness, and conformance to policies and procedures.
- Approves all hiring, promotion, salary adjustments, changes to organizational structure, dismissals, promotions, demotions, performance evaluations and suspension of more than 30 days; oversees personnel actions taken by department heads; serves as final internal decision-maker on employee grievances.
- Negotiates all City union contracts and terms of employment for employees.
- Sees that all laws and ordinances are faithfully enforced.
- Oversees the planning, preparing, recommending and administering of the annual City budget.
- Attends meetings of the Council and fully informs and advises them on all significant matters and important activities and developments that they will need to know to perform effectively as City Council members, including but not limited to informing and advising them on policies, government affairs, financial conditions and needs of the City.
- Represents the City in contacts with persons, agencies, adjoining townships, local business groups, and businesses relative to various City matters, including development and provision of services, handling of resident concerns, etc.; delegates liaison responsibility for such matters to key personnel as appropriate; maintains good public relations with the citizens of the community; works collaboratively with other public agencies, cities, counties, tribes, school districts, etc., and participates in community associations and events.
- Responsible authority for all City contracts, formal disputes/lawsuit strategy evaluations, negotiating City property and facility transactions, policy decisions, leases, easements, and permits.
- Maintains personal integrity and ethical work practices that will set and maintain the standards of conduct for all City personnel.

DESIRED CAPABILITIES

The next City Manager must possess a unique blend of skills and qualities to effectively lead and govern the City. From conflict resolution and communication to visionary leadership and execution of plans, the desired capabilities are multifaceted. This individual must be a collaborative consensus builder, fostering cooperation among department directors and staff while promoting open communication and transparency. They should bring their analysis and judgment to the City Council, respectfully challenging the status quo and offering bold new ideas that align with the City's values. With experience in administering organizations of complexity, a keen understanding of community development, and a balanced approach to financial responsibility, the next City Manager will play a pivotal role in shaping Bemidji's future while respecting its past successes. The desired capabilities of the next City Manager are as follows:

Consensus building: The City Manager should be a consensus builder, capable of bringing together diverse perspectives and facilitating decision-making processes. This skill is important for maintaining a cohesive and productive work environment.

Communication and cooperation: The City Manager should excel in communication, developing relationships, and fostering open and transparent communication channels with all stakeholders at the local, state, tribal, and federal level. Collaboration, cooperation, and solid intergovernmental relationships with all stakeholders are essential for successful governance.

Experienced and open: The City Manager should have relevant experience in managing similar organizations, but they should also be open and willing to listen and learn from the existing staff and community.

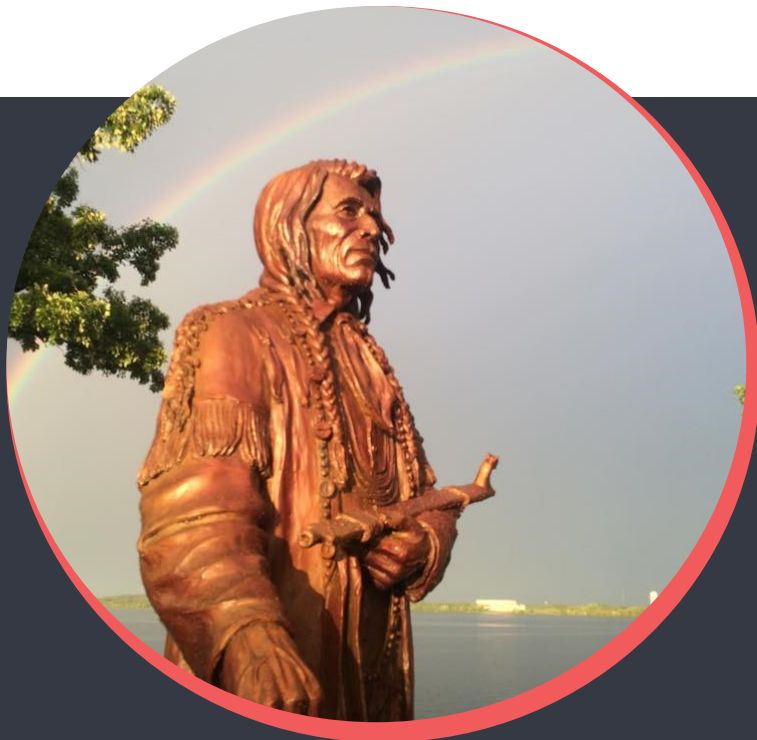
Understanding of community development: The City Manager should understand land development and the ability to prioritize ideas based on timing, financial feasibility, and impact on the City. They should also build relationships with external agencies providing services to the City and stakeholders invested in the City's prosperity.

Financial responsibility: The City Manager shall be responsible for formulating and implementing comprehensive strategies aimed at fostering the expansion of the City's tax base, fostering job creation, and generating sustainable new revenue streams. Additionally, the City Manager will actively explore avenues to enhance the City's capacity to effectively address its capital improvement needs.

Visionary and innovative: The City Manager shall be a leader that models behavior appropriate for an increasingly diverse organization and population and is self-motivated to seek out and implement innovative programs and services that recognizes the importance of the arts, education, diversity and inclusion, culture, and recreation opportunities for all community demographics.

Building trust: The City Manager shall establish trust and credibility with the City Council, staff, and the community; listening, communicating information, and managing expectations will be important activities. Building trust will enable the City Manager to help everyone see the big picture and establish shared goals.

Promote equity, diversity, and inclusion: The City Manager will be dedicated to fostering a city that embraces equity, diversity, and inclusion in all aspects of governance and community life; addressing disparities and cultivating an environment where every citizen can thrive, knowing they are valued and respected.



EDUCATION AND EXPERIENCE

The successful candidate will hold a bachelor's degree from an accredited college or university in public administration, business administration, management, or related field, and have eight (8) years of progressive local government leadership experience, including at least five (5) years of which was at a management level. A master's degree and experience as a city manager/administrator or assistant city manager/administrator is preferred.



COMPENSATION AND BENEFITS

The starting salary for this position will be \$141,000 to \$179,000 depending on qualifications and experience. Additionally, the City of Bemidji offers a comprehensive benefit package.

APPLICATION PROCESS

We invite qualified professionals to submit a cover letter and resume by visiting our website at:

[GovernmentJobs.com/Careers/Bakertilly](https://www.governmentjobs.com/careers/bakertilly)

This position is open until filled; however, first review of resumes occurs on August 17, 2023.

Following the first review date, all applications will be evaluated against the posted qualifications, and invitations may be extended to submit additional information, including references, and a formal interview to a select few.

For more information, please contact:

Patty Heminover at **patty.heminover@bakertilly.com** or 651-968-7841.

For more information about Bemidji, visit: **www.ci.bemidji.mn.us** and **www.visitbemidji.com**.

The City of Bemidji is committed to the policy of affirmative action/equal employment opportunity in recruitment, hiring, career advancement and all other personnel practices. All information provided will be treated confidentially to the extent allowed by law and will be used only to determine your qualifications for the position.



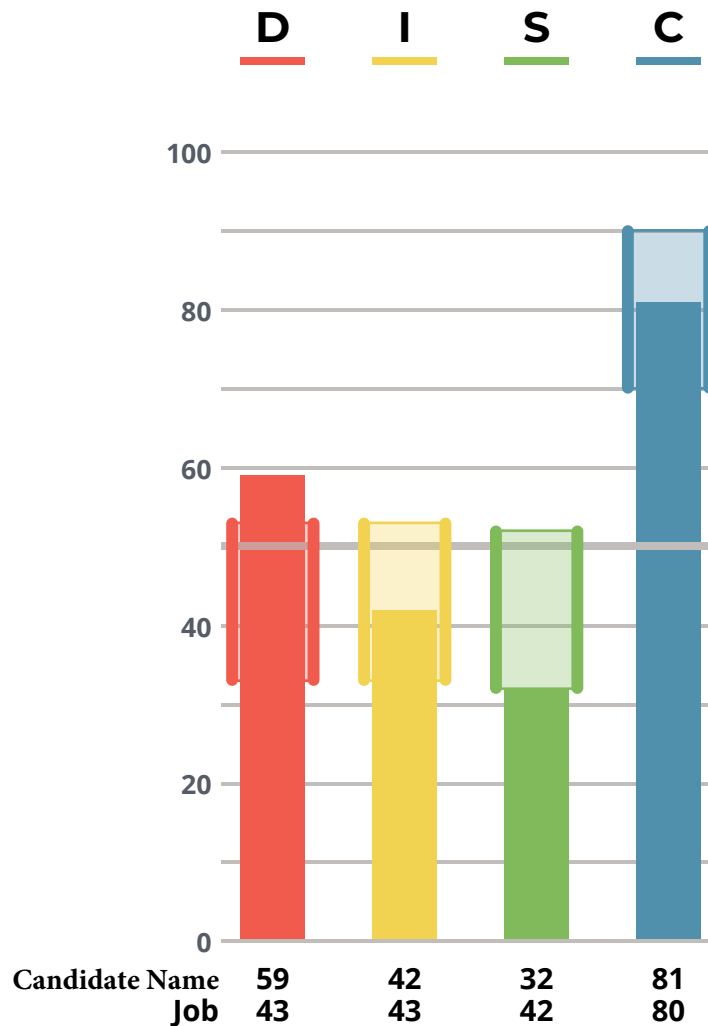
Appendix C: Sample TTI report

Workplace Behaviors®



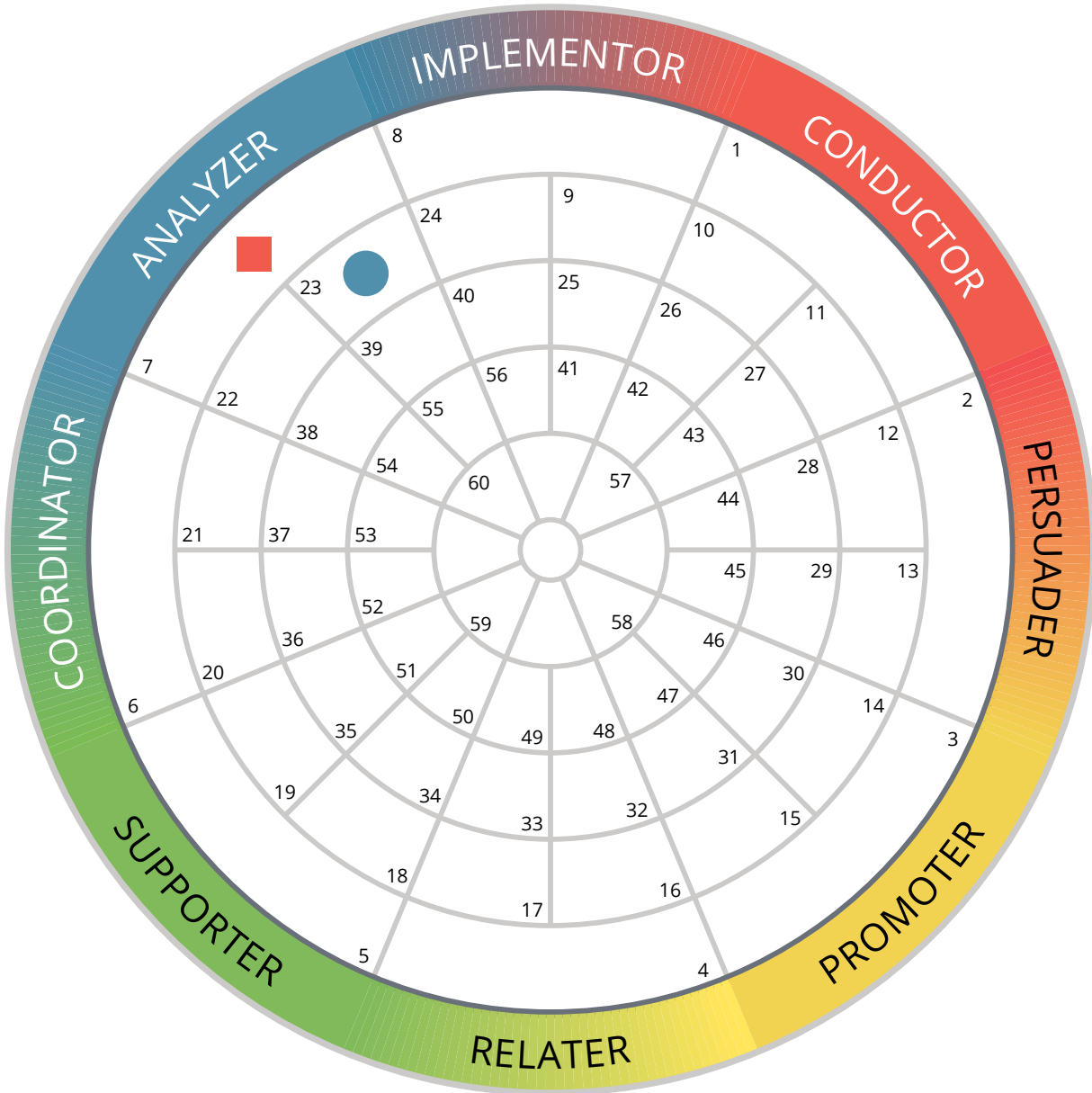
Candidate Name

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



Job Range (20 point range)

The Success Insights® Wheel



Job - (7) ANALYZER

Candidate Name - (23) IMPLEMENTING ANALYZER

Comparison Analysis

For Consulting And Coaching



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

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

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

 Exact match
  Fair compatibility
  Good compatibility
  Poor compatibility
  Over-focused

Candidate Name

Appendix D: Engagement team member resumes

DIRECTOR

Patricia Heminover

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



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Education

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

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

Master of Education, administration
Minnesota State University – Mankato

Patty has been with the firm since 2010. Before 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, and director of human resources and business services for two Minnesota school districts
- Facilitated discussions with legislators at the state level regarding education funding, securing new funding for a Minnesota school district

Industry involvement

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

Continuing professional education

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

DIRECTOR

Art Davis

Art Davis, a director with Baker Tilly, has pursued his passion for improving local government and creating great communities for over 30 years.



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art.davis@bakertilly.com

bakertilly.com

Education

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

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

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

Specific experience

- Successfully launched and expanded his own local government consulting firm over the course of 10 years
- More than 18 years of 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

Yolanda Howze, M.P.A., IPMA-SCP, SPHR, SHRM-SCP

Yolanda Howze, a director with Baker Tilly, brings more than 25 years of public sector experience, including 20 years as a multifaceted and competent human resources leader.



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United States

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Education

Dual Bachelor of Arts in
psychology and organizational
leadership
Maryville University
(St. Louis, Missouri)

Master of Arts in public
administration and policy analysis
Southern Illinois University
Edwardsville (SIUE)

Yolanda is a well-regarded, award-winning human resources professional with more than 20 years of public sector human resources experience, primarily in municipal government.

Having worked in the public sector for more than 25 years, Yolanda is passionate about her craft and being of service to others, which, in addition to her employment experience, she has demonstrated through professional conference presentations/speaking events and serving on local and regional boards and committees including IPMA-HR, as well as other community involvement.

Specific experience

- Human capital professional and administrator executive
- Executive recruitment, total rewards and classification administration, performance management, project management, HRIS and process improvement, change management, labor relations, emergency management and disaster recovery, training and organizational development and safety and risk management

Industry involvement

- International Public Management Association - Human Resources (IPMA-HR)
- Society for Human Resource Management (SHRM)
- Texas Municipal Human Resources Association (TMHRA)
- IPMA-HR Texas Chapter, (former) Conference Program Committee
- IPMA-HR Central Region, (former) vice president ('10)
- IPMA-HR Central Region, (former) former Secretary-treasurer ('09-'10)
- IPMA-HR Greater St. Louis Chapter, (former) president

Continuing professional education

- International Public Management Association-Human Resources (IPMA-HR)
- IPMA-HR Greater St. Louis Chapter
- Human Resources Certification Institute (HRCI)
- Society for Human Resources (SHRM) certified [professional](#)

MANAGING DIRECTOR

Anne Lewis

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



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Education

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

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

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

Industry involvement

- International City/County Management Association, Credentialed Manager (ICMA)
 - Taskforce on recruitment guidelines handbook
 - Taskforce on women in the profession
 - Taskforce on internship guidelines
- Government Finance Officers Association (GFOA)
- Virginia Local Government Management Association (VLGMA), former member of the executive board
- Virginia Women Leading Government
- National Public Employer Labor Relations Association (NPELRA)

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

DIRECTOR

Edward G. Williams, Ph.D.

Edward Williams brings character, competence and expertise to every project.



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Education

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

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

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

Languages

English
Spanish

Edward has more than 20 years of collective experience in human resources and organizational development at various levels and across multiple 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

SENIOR RECRUITMENT ANALYST

Karen Edwards, SHRM-CP

Karen Edwards, a senior recruitment analyst with Baker Tilly, has been with the firm since 2021.



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Education

Bachelor of Science in business
administration - human resource
management
Western Governors University

Karen is a senior recruitment analyst with Baker Tilly's executive recruitment practice group. Her responsibilities include assisting in the coordination of executive recruitments. Karen manages outreach, generates reports, conducts detailed background checks and analyzes data to ensure the success of all engagements.

Specific experience

- More than 30 years of experience in human resources, administrative positions and customer service
- Proficient in analyzing data, creating and implementing standard operating procedures and preparing presentations and reports
- Adept at identifying inefficiencies to enhance organizational performance and streamlining office operations
- History of success adapting in dynamic environments to effectively manage multiple projects simultaneously

Continuing professional education

- Society for Human Resources (SHRM) certified professional

MANAGER

Michelle Lopez

Michelle Lopez, a manager at Baker Tilly, has been with the firm since 2017.



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bakertilly.com

Education

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

Bachelor of Science, project
management (in progress)
Colorado State University – Global
Campus

Michelle assists in the organizational management of the executive recruitment process. Her primary focus is to ensure that the recruitment process runs smoothly from start to finish by collaborating closely with internal team members, clients and candidates. Michelle is responsible for coordinating the recruitment process workflow, establishing timelines and monitoring progress. She is also responsible for managing communication channels, ensuring that everyone involved is informed of critical developments and updates.

Specific experience

- More than ten 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

RECRUITMENT ANALYST

Diane Segulia

Diane Segulia, a recruitment analyst at Baker Tilly, has been with the firm since 2015.



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diane.segulia@bakertilly.com

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Education

University of Minnesota – partial
credits (Minneapolis, Minnesota)

Diane is a recruitment analyst with Baker Tilly's executive recruitment practice group. Her responsibilities include conducting research for the consultants, completing background checks, coordinating information and resources and collaborating with candidates and clients through all phases of an executive recruitment.

Specific experience

- More than ten years of administrative support experience in public sector and private sector organizations
- Compiling and organizing candidate materials
- Coordinating with candidates throughout the recruitment process
- Conducting reference checks for potential candidates
- Coordinating and scheduling interviews
- Recruitment marketing research and organization

RECRUITMENT ANALYST

Carrie Thompson

Carrie Thompson, a recruitment analyst with Baker Tilly, has been with the firm since 2021.



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Tysons, VA 22182
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Education

Bachelor of Arts in communication
with a concentration in media
production and criticism
George Mason University

Carrie facilitates smooth sailing during the recruitment process. She runs reports, coordinates outreach and organizes essential documents. Along with her work behind the scenes, she collaborates with clients and candidates to help them on their journey to success.

Specific experience

- More than 15 years of customer service experience for multiple industries
- More than four years of experience in recruiting coordination, including interview scheduling and candidate communication
- Expertise in marketing and position advertising via LinkedIn
- Reference and extensive background checks for potential candidates

Community involvement

- Mission trip volunteer with Herndon United Methodist Church



Charter Oak Recruitment Services
ATTN: Ryan Gousse, Business Development Coordinator
160 Colony Road: New Haven, CT 06511
ryan.gousse@charteroakrecruitment.com
407.923.6298

City of North Branch

RFP for Executive Search Firm City Administrator Recruitment
May 22, 2024

Qualifications

Charter Oak Recruitment offers nationwide, full-service recruitment within Municipal Entities. Founded with the conviction that recruitment must serve as a lever toward a more equitable world, Charter Oak capitalizes on state-of-the-art technology without compromising the undeniable power of person-to-person interaction.

Key Personnel

Grant Underwood, Principal Recruiter - [LinkedIn Resume](#)

160 N Colony Road

New Haven, CT 06511

(937) 243-1772

grant.underwood@charteroakrecruitment.com

Recent Placements

- Administrator, Graymoor Retreat (Garrison, NY)
- Administrator, Diocese of Nashville (Nashville, TN)
- Operations Manager, Candor & Co. (Atlanta, GA)
- Chief of Staff, Hand, Heart, and Soul Project (Atlanta, GA)
- Executive Director, Bronx Global Learning Institute for Girls Charter School (NY, NY)
- Dean of Students, Bronx Global Learning Institute for Girls Charter School (NY, NY)
- Executive Director, St. Francis (San Juan Bautista, CA)
- Executive Director, San Damiano (Danville, CA)
- Academic Dean, Alma del Mar Charter Schools (New Bedford, MA)
- Dean of Culture and Community, Ascend Learning (Brooklyn, NY)

Methodology/Timeline

Our Five-Step Approach

1. **Search Launch (1 Day):** Charter Oak partners Charter Oak partners with schools to align on the profile calibration and goals for each job opening. By completing a simple online intake form and providing a detailed position description, our partners help us create personalized search parameters and targeted outreach messages.
2. **Candidate Sourcing (30 Days):** Charter Oak finds and creates a dynamic pool of candidates aligned with each school partner's mission, needs, and values. We leave no stone unturned in saturating the market. While we specialize in referral campaigns, LinkedIn enterprise, RocketReach enterprise, Grayscale for enterprise, and strategic job postings, we tailor our partners' sourcing needs to the intricacies of each unique search.
3. **Initial Interview (15 Days):** Charter Oak creates unique candidate pools for each school based on the profile calibration from Step 1. We focus on the logistics of the search: details often inadvertently deprioritized such as commute times, salary expectations,

certification, sponsorship needs, and start date. That way, once candidates get to our partners, the school is ready to focus on interviewing against competencies.

4. **Onsite Interview* (15 Days):** Charter Oak empowers our school partners to have complete control over the selection, vetting, reference, and hiring process. Once we introduce candidates that meet the client's criteria, they can decide how to execute their own interviews. Of course, Charter Oak is always available to offer expert guidance on candidate visits, offer reviews, reference checks, and onboarding transitions.
5. **Offer Decision* (7 Days):** The school decides whether to extend an offer. If an offer is extended, Charter Oak can also advise on how to help the candidate get to clarity on whether to accept. On average, two out of every three Charter Oak candidates accept their offer.

***Additional Services Provided to Client for End-To-End Search** – Charter Oak will provide these End-To-End services that will help advise and engage all stakeholders up until the offer is signed:

- **Onsite Interview Logistics:** Aligning candidate and hiring team availability; sending clients detailed confirmation email; hosting a preparation call with candidate (upon client's discretion); hosting onsite interviews for a maximum of two interview days, approximately 7 AM – 5 PM or similar (additional cost applies for recruiter on-site hosting).
- **Advising on Competencies and Interview Modules:** Propose set of Leadership Competencies for committee to workshop, amend, and make unique to needs of individual search; Propose phone and onsite interview modules pertaining to relevant competencies.
- **Candidate Matriculation Plan:** Propose and execute a candidate matriculation plan for a successful candidate, to maximize chance of accepted offer and clear expectations leading up to candidate's start date.
- **Reference Checks:** For each candidate with a verbal offer, provide a reference report detailing 2-3 professional references and a recommendation based on the reference data. (Note: FBI Criminal Background check, DMV Record Check, Educational credential verification, and previous Employment Verification are not available by default, but all are available for an additional \$1,500).

Billing Rate and Structure

Please see attached Recruitment Engagement Letter for City Administrator.

- Attachment A
 - Pages 4-6

ATTACHMENT A:**Recruitment Engagement Letter for City Administrator****City of North Branch****Recruitment Engagement Letter: City Administrator*****Search Specifications***

- This Agreement pertains to the City Administrator search for City of North Branch (hereafter, "Hiring Partner").
- Charter Oak will share the salary range on the job description. The salary range is ____
- Charter Oak will share the targeted start date of _____ on the job description.

Sourcing Procedures

- We will commence work upon receipt of a signed copy of this agreement and payment of the Listing Fee.
- We will leverage our databases, networks, and general acumen to initial a regional/nationwide (as applicable) search.
- We will engage in initial interviews and thereafter present a field of the most competitive candidates.
- We'll be available to assist in any reasonable way before, during after employment of the final candidate.
- We'll execute recruitment efforts as quickly as possible without sacrificing quality or full market exposure.
- To comply with federal antitrust law, we don't honor anti-poaching agreements, regardless of whether they are formal or informal. See [here](#) for more.
- FBI Background Checks, employer verification, and educational verification are not included in this contract.

Media Procedures

- We will accept and process public candidate applications on your behalf in our Applicant Tracking System;
- We will use our networks and databases to post to as many job boards as we deem necessary for market saturation;
- We will recruit applicants on your behalf, communicating the job description; name, location, salary, and details about you, the employer; we'll disclose that Charter Oak works on behalf of you, the employer, for purposes of this search.

- To maintain employee engagement, we'll congratulate successful candidate on LinkedIn or via our website.

Fee Schedule

Our fee, payable by Hiring Partner, is in three phases: \$300 listing fee; \$6,000 sourcing fee; \$6,000 placement fee, which is contingent upon successful signed offer of a Charter Oak candidate. The listing fee will be invoiced now; the sourcing fee will be invoiced no earlier than the date Charter Oak shares relevant applicants for this role; the placement fee will be invoiced no earlier than the date of candidate's signed offer.

On the Condition of Multiple Hires Resulting from this Agreement

If Hiring Partner hires more than one candidate referred by Charter Oak resulting from the Scope of Work in this contract, the payment schedule for all hires after the first is: \$12,300 flat rate (Retention Quality Assurance is an extra optional add-on), to be invoiced no earlier than date of candidate's offer acceptance. Invoices payable 21 calendar days from invoice date. Except for tax-exempt institutions, applicable sales and service taxes are added. We reserve right to include as salary any expected bonus, commission or guaranteed increase in salary which is part of the initial employment offer. Hiring Partner may elect to add the Quality Assurance Guarantee for an additional cost (see below).

Charter Oak's Retention Quality Assurance Guarantee

The Hiring Partner shall have the option to add the below Retention Quality Assurance Guarantee for an additional price of \$3,075 added to the Listing Fee. The benefits of the Retention Quality Assurance are as follows:

If Hiring Partner terminates the successful candidate within 90 days of start date, or if the successful candidate resigns/reneges within 90 days of start date, Charter Oak will redo the search at no cost to the Hiring Partner. Continued employment shall be assumed by default unless Hiring Partner furnishes documentation of resignation or termination of employee. Changes or decreases in roles/responsibilities or shifting employee to an alternative role does not constitute termination or resignation.

Note: Different durations of quality assurance guarantees are available upon request. Additional pricing may apply.

_____ YES, the Hiring Partner wishes to add the Retention Quality Assurance Guarantee for the additional cost outlined above.

_____ NO, the Hiring Partner does not wish to add the Retention Quality Assurance Guarantee. Therefore, the Hiring Partner hereby waives access to Charter Oak's Retention Quality Assurance policy in the event the new hire reneges on their offer before their start date, resigns from their position within 90 days after start date, or is terminated within 90 days after their start date.

Referral Definition

Fee applies to candidates referred by us for a specified or alternate position and employed in any

capacity by you (or another entity resulting from subsequent referrals by you), within 12 months from date of our last referral of a candidate.

Background Inquiries

Please notify us immediately if you require Charter Oak to perform additional background checks, including criminal background checks or other placement screenings of the candidate. We will conduct such additional checks or screenings only if they are described in a signed, written amendment to this Fee Schedule & Guarantee.

Name of Charter Oak Representative (Print)

Name of Hiring Partner Representative (Print)

Signature of Charter Oak Representative

Signature of Hiring Partner Representative

Date Signed by Charter Oak Representative

Date Signed by Hiring Partner Representative

**Clovity Inc Response to:
The City of North Branch
For
Request For Proposal
Executive Search Firm
City Administrator Recruitment
Date of Submission : 05/22/2024**



NORTH BRANCH

Submitted by:

Name: Vikas Soman

Title: Senior Bid Manager

Email: procurement@clovity.com

Phone: 510-916-1697

Website: www.Clovity.com

Address: 11501, Dublin Blvd. #200

Dublin, California - 94568





1.Cover Letter

Date: 05/22/2024
Attn: The City of North Branch
Email: raginiv@ci.north-branch.mn.us

Subject: Response to **RFP Executive Search Firm**

Respected,

Clovity Inc (Clovity) is pleased to submit their response to **The City of North Branch for RFP Executive Search Firm**. Clovity understands the City of North Branch's urgent need for a city administrator, and we are committed to providing one promptly to meet your requirements.

About Clovity

Incorporated in 2008 in California as a Corporation, Clovity is an experienced staffing & recruiting company providing all types of Recruitment & Staffing Services in IT and Non-IT to Public & Private agencies. We have been honoured with multiple awards by different State, City and Private entities.

Clovity is **a registered entity in the State of California**, with headquarters located in Dublin. We also have a local office in **Minnesota**, where we maintain a **good standing** and possess a **BRC** from the state. We are a highly diverse company possessing **MBE and SBE (DGS) certifications** from the State of California.

Clovity's mission, vision & values

Clovity's mission, vision, and values align closely with those of **the City of North Branch**, fostering a symbiotic relationship grounded in community enhancement and sustainable development. Clovity's emphasis on excellence, collaboration, and innovation dovetails with North Branch's vision of being a safe, growing community with robust amenities and a high quality of life. Clovity's dedication to building trust and community through partnerships with customers, employees, and the broader community mirrors North Branch's values of fostering a strong sense of community and promoting a hometown feel. Both Clovity and North Branch prioritize stakeholder engagement and mutual respect, which is reflected in North Branch's commitment to effective governance and community affairs. Additionally, Clovity's focus on economic value and sustainable business practices aligns with North Branch's goals of financial wellness and asset management, ensuring that investments and resources are utilized efficiently for future growth and community benefit. Together, Clovity and North Branch share a vision of collaborative progress, community well-being, and sustainable development.

Clovity's experience in providing similar services:

Clovity has **15+ years** of focused **Recruitment services**, Non-IT & IT Staffing as well as modern system development experience and always looks to future-proof their solutions for their clients. We possess cutting-edge capabilities in recruiting services, ensuring that we stay at the forefront of all industry advancements. Our recruiting team is experienced in broad recruitment for **City Manager, Senior**



Manager, City Administrator, County Executives, Mayors, Administrators, Vice President, Senior Executive, Director and many other positions.

We have been serving multi million contracts with **75+ clients in the public sector and 50+ in the private sector**. Our Customer Satisfaction Score **(CSS) stands at 9.2/10** which is owed to our **one call reachability** and customer-centric approach.

Of late, we have been working with below mentioned lists of top clients:

Public Agency Name	State	Services Provided
1.State of Minnesota	Minnesota	Recruiting & Financial employment services
2.Judicial Council of California	California	Department Director Services
3.California's Air Resource Board	California	Management staff Recruitment services
4.US Army Corps of Engineers	California	Administrative Staff Augmentation & Recruitment services
5.The State of Florida	Florida	Executive Recruitment Services
6.State of Kansas	Kansas	Staff Recruiting services

Private Agency Name	State	Services Provided
1. Bremer Bank	Minnesota	Recruitment/Administrative and accounting services
2. Best Buy	Minnesota	Administrative Staff Augmentation
3. Capital One	Illinois	Walmart Credit Card Partnership & Others and staffing services
4. Core well Health (formerly Beaumont/Spectrum Health)	Michigan	Temporary IT Staffing Services
5. Advanta sure	Michigan	Recruitment services & Staff Augmentation
6. Square	California	Temporary staffing Services

*The qualifications of key personnels:*

Name	Qualification	Experience
Cameron Starman (Director of Client Management)	Bachelor of Arts in Sociology, Spring (2012) University of California Santa Barbara	Over the past 7+ years, he has overseen a substantial portion of Clovity's most critical accounts, leading to substantial growth in the staff augmentation segment. He is committed to providing the highest caliber of resources, both technically proficient and possessing strong interpersonal skills. Currently, he fulfills the same role for key clients such as the State of Minnesota, State of Florida, State of California, State of Maryland , and numerous other major public clients of Clovity.
Prahlad Singh Dogra (Head of Delivery) (Will act as Project Manager for The City of North Branch)	B.E. –Information Technology (2011) Punjab Technical University, Punjab	He is the Project Manager overseeing this project (If awarded), a dedicated and accomplished professional with over 11+ years of experience in Recruiting and Delivery Management. Proficient in recruiting, managing, and evaluating resources, he emphasizes team building and optimizing resource allocation. He fulfills the same role for key clients such as the State of Minnesota, State of Florida, State of California, State of Maryland , and numerous other major public clients of Clovity.
Priyanka Pawar (Head of Human Resource and Hiring)	All India Management Association (AIMA) (Jul 2014 - Dec 2016) MBA - Delhi Human Resources Management	With over 12+ years of dedicated experience, she is seasoned Human Resources Manager known for fostering productive communication and coordination within organizations for over a decade. Her expertise lies in Employee Relations, Payroll & Compliance, and Workforce Management. Excel in building rapport at all levels and swiftly resolving issues to ensure smooth operations.

We understand the importance of finding a City Administrator who embodies the values and vision of the City of North Branch. Our experienced executive recruitment firm is committed to conducting a thorough search to identify a candidate who will not only meet but exceed your expectations. We have a proven track record in successfully placing executives in municipal organizations of similar size and scope, ensuring that the search process and resulting hire align with the City's mission and key priorities. We are dedicated to fulfilling your needs and contributing to the continued growth and success of the City of North Branch.



Point of Contact

Name: Vikas Soman

Title: Senior Manager - Bid Management

Email: procurement@Clovity.com

Phone: 510-916-1697

Address: 11501 Dublin Blvd, #200 Dublin, CA 94568

Clovity with this certifies, by submission and signature of this letter, represents complete and unconditional acceptance of the requirements, terms and conditions of this RFP.

Sincerely,

DocuSigned by:

A4DCB4610E494DF...

Vikas Soman

Senior Manager - Bid Management

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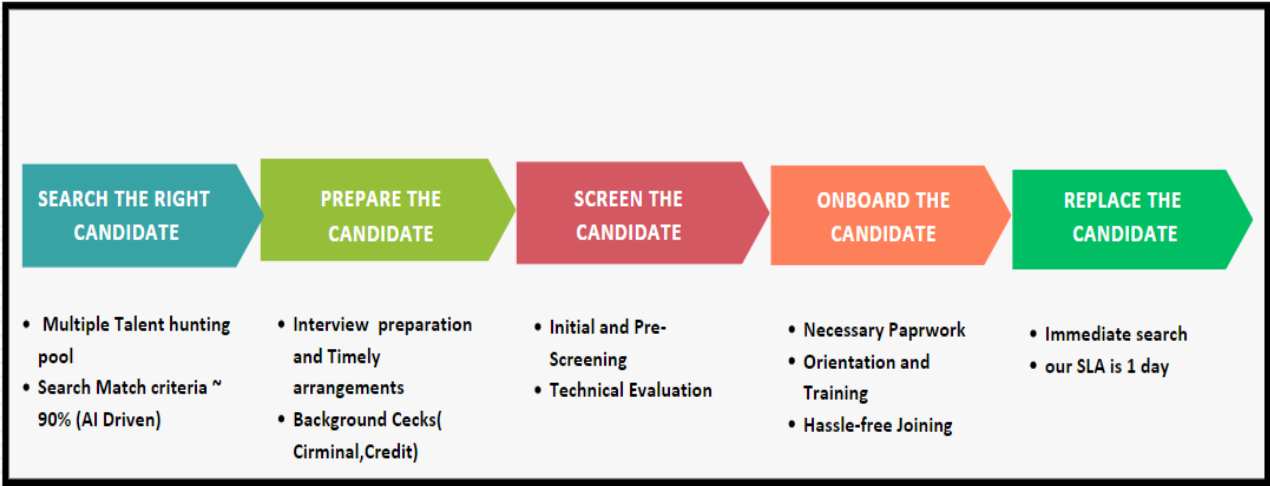
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2.State of Proposed Work

Methodology

Clovity’s Response: Clovity will take an **Agile Methodology** approach to develop a discovery approach to gather all needed requirements and supplying resources to the City of North Branch. Through consistent feedback and meeting, we will continue to refine our searches and quality of candidate through each engagement. In an **Agile Methodology**, this decreases the number of major changes ultimately needed to derive a proper outcome by constantly making tweaks throughout the process to enhance it. By giving our clients iterative recruiting processes, we can quickly revise our process and continue to the next set of requirements. ***Below is the high-level process that we will follow to make a successful delivery once we will receive a request from the City of North Branch.***



“While recruiting, Clovity always follow “3P approach” i.e. We always place the right People using the robust and well-defined set of Processes at right Positions”

Clovity go through rigorous screening, matching and selection process for the City of North Branch. Clovity’s well-defined recruitment process ensures that we are able to attract the best talent available at **competitive rates**, thus providing highly qualified personnel on time so that the City of North Branch expectations are always met and often, exceeded. Through experience, Clovity has in place a detailed and proven process to select and manage employees and ensure the selection of the best resources with proven experience and a history of customer satisfaction.

We form a team where the members complement each other. The team approach offers less conflict, stronger capability through specialization & synergies, quicker response & a cohesive approach that ultimately results in less risk; & offers the customer the best combination of performance, cost, and delivery for the services being acquired.

Clovity operates through various phases that streamline the workflow, ensuring timely results:



PHASE - 1
POSITION ASSESSMENT, POSITION ANNOUNCEMENT, & BROCHURE

Clovity treats each executive recruitment as a transparent partnership with our client. We believe in engaging with stakeholders early in each recruitment process to fully understand the challenges and opportunities inherent in the position. Understanding the organizational culture is critical to successful recruitment. We gain this insight and information through meetings (one on one and in small groups), surveys, and a review of relevant information. This information is reflected in a polished marketing piece that showcases the organization and the area it serves.

INFORMATION GATHERING

- ♦ One-on-one or group interviews with stakeholders identified by the City of North Branch.
- ♦ Clovity can establish a dedicated email address for feedback from stakeholders or the community.
- ♦ Community forums (in-person or via video) can be used to gather input and feedback.
- ♦ Surveys can be used for department personnel and/or the community to gather feedback.
- ♦ Conversations/interviews with department heads.

A combination of the items listed above can be used to fully understand community and organizational needs and expectations for the position (this proposal includes 12 hours of meetings – additional meetings can be added for actual expenses if incurred). Dedicated email address and one organizational survey are included. A Community Survey can be conducted. Community Forums are conducted as an optional service.

Development of a **POSITION ANNOUNCEMENT** to be placed on websites and social media.

Development of a thorough **RECRUITMENT BROCHURE** for the City of North Branch’s review and approval.

Agreement on a detailed **RECRUITMENT TIMETABLE** – a typical recruitment takes between 15-30 days from the time you sign the contract to the appointment of the finalist candidate.

PHASE 2
ADVERTISING, CANDIDATE RECRUITMENT, & OUTREACH

We make extensive use of social media as well as traditional outreach methods to ensure a diverse and highly qualified pool of candidates. Our website is well known in the local and state government industry – we typically have 17,000+ visits monthly to our website and career center. Additionally, our weekly jobs listings are sent to over 8,000 subscribers.

Phase 2 will include the following:

- **Clovity consultants will personally identify and contact potential candidates:**
 - Develop a database of potential candidates from across the country unique to the position and to the City of North Branch, focusing on:
 - Leadership and management skills.
 - Size of organization.
 - Experience in addressing challenges and opportunities is also outlined in Phase 1.
 - The database will range from several hundred to thousands of names. An email campaign will be sent to each potential candidate.



- **Placement of the Position Announcement:**
- Public sector online Career Centers.
 - **Social media:** LinkedIn (posted on Clovity Executives LinkedIn news feeds to reach over 50,000 connections), Facebook, and Instagram.
 - Clovity will provide the City of North Branch with a list of advertising options for approval.

PHASE 3
CANDIDATE EVALUATION & SCREENING

Phase 3 will include the following steps:

- Review and evaluation of candidate’s credentials with consideration to the criteria outlined in the Recruitment Brochure.
- Candidates will be narrowed down to those that meet the qualification criteria.
- Candidate evaluation process:
- Completion of a questionnaire explaining prior work experience.
- Live Video Interview (45 minutes to 1 hour) conducted by consultant with each finalist candidate.
- References provided by the candidate are contacted.
- Internet/Social Media search conducted on each finalist candidate.

All resumes will be acknowledged and inquiries from candidates will be personally handled by Clovity, ensuring City of North Branch’s process is professional and well regarded by all who participate.

PHASE 4
PRESENTATION OF RECOMMENDED CANDIDATES

Phase 4 will include the following steps:

- Clovity will prepare a Recruitment Report presenting the credentials of those candidates most qualified for the position.
- Clovity will provide an electronic recruitment portfolio which contains the candidate’s materials along with a “mini” resume for each candidate so that credentials are presented in a uniform way.
- The City of North Branch will receive a log of all applicants and may review resumes if requested.
- Report will arrive in advance of the Recruitment Report Presentation.

Clovity will meet with the City of North Branch to review the recruitment report and provide additional information on the candidates.

PHASE 5
INTERVIEWING PROCESS & BACKGROUND SCREENING

Phase 5 will include Clovity completing the following steps:

- Develop the first and second round interview questions for the City of North Branch’s review and comment.
- Coordinate candidate travel and accommodations.
- Provide the City of North Branch with an electronic file that includes:



North Branch Request for Proposals: Executive Search Firm

- Candidate’s credentials.
- Set of questions with room for interviewers to make notes.
- Evaluation sheets to assist interviewers in assessing the candidate’s skills and abilities.

Background screening will be conducted along with additional references contacted.

Clovity Background Screening as per client’s requirement

- | | |
|---|---|
| <ul style="list-style-type: none">• Social Security Trace & Verification• US Federal Criminal Search• Enhanced Verified National Criminal• National Sex Offender Registry• Most Wanted Lists: Federal Bureau of Investigation (FBI), Drug Enforcement Agency(DEA), Bureau of Alcohol, Tobacco, Firearms and Explosives (ATF), Interpol• Office of Foreign Assets Control (OFAC) Terrorist Database Search• Office of the Inspector General (OIG), General Services Administration (GSA), System for Award Management (SAM), Food and Drug Administration (FDA)• All felonies and misdemeanors reported to the National Database | <ul style="list-style-type: none">• County/Statewide Criminal• Civil Search• Bankruptcy, Leans, and Judgements• Motor Vehicle Record• Education Verification – All Degrees Earned |
|---|---|

***PHASE 6
APPOINTMENT OF CANDIDATE***

- Clovity will assist you as much as requested with the salary and benefit negotiations and drafting of an employment agreement, if appropriate.
- Clovity will notify all applicants of the final appointment, providing professional background information to the successful candidate.

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Timeline

Clovity's Response: Here is a step by step and day by day overview for Clovity staffing/recruiting procedures. There will be some variation in this depending on client processes and feedback intervals but for the most part this should be followed rather closely. ***We adhere to the RACI (Responsible, Accountable, Consulted, and Informed) matrix in our recruitment process, delineating activities required to complete various tasks and specifying the responsible individuals for each activity.***

<i>Project Timelines</i>	<i>Task-owner title</i>
Day 1: Timelines	
Requisition Received from our Client.	<i>Project Manager</i>
Response to Client Confirming Receipt of Requirements and Undertaking of recruitment process. (1-4 hours)	<i>Project Manager</i>
Recruiting Team begins to source from a robust list of Clovity bench candidates, pools of pre- screened/pre-cleared candidates that are non-bench, to the larger community available on resume portals, and the job is posted on industry leading job portals if necessary. (4-8 hours)	<i>Sr. Recruiting Manager</i>
If strong candidate(s) are shortlisted on Day 1, they will be interviewed, code tested, and vetted within the first 24 hours by a technical resource with aligning skills and the Client Director. If speed is critical, these interviews can be done together, or they will be done in two separate sessions to ensure the candidate is an optimal fit for the role and environment they are being placed in. (1-2 Hours)	<i>Service Delivery Manager</i>
If a candidate(s) is selected during the internal interview process and are 100% compliant from a reference, background and certification standpoint, the candidate will then be submitted same day or latest, first thing the following morning. (1 Hour)	<i>Project Manager</i>
Day 2: Timelines	
Recruiting process resumes to provide more options to fill multiple positions. Clovity tried to normally provide at least 3 top level candidates for each open position to ensure a better choice for their clients. (4-6 hours)	<i>Service Delivery Manager</i>
During this time, other internally shortlisted candidates will be code tested, interviewed and reference/certification checked by both a client facing as well as a	



technical resource, and will be submitted upon validation of compliance to the client. (1-2 hours)	Service Delivery Manager
Upon receiving a sufficient number of candidates, the Client Director will promptly schedule a resume review or feedback call with the project manager and relevant stakeholders as per their earliest availability. The hourly rates of these potential resources will be carefully validated to ensure alignment with the project budget for long-term viability. (Estimated duration: 1 hour)	Project Manager
Interviews will then be set after the resume meeting or post receiving verbal/written feedback from the project leads and/or manager. Feedback methods are fully dictated by the client's wishes and will be specific to the manager or group we are working with. (1-2 hours)	Sr. Recruiting Manager
Day 3: Timelines	
Client interviews are conducted in person, via video conference, or over the phone as requested by the client. Any further client coding tests or aptitude sessions are conducted simultaneously as needed per their requirements if applicable. (1-4 hours)	Service Delivery Manager
Interviewed candidates that are selected by the client's project stakeholders will then move into the on-boarding stage. (1 hour)	Sr. Recruiting Manager
Background checks and E-Verify compliance reports are commenced on all selected candidates based strictly per the requirements of the client or if none are put forth, per Clovity's standard operating procedure. (1 hour)	Sr. Recruiting Manager
Day 4/5: Timelines	
Normally within 24-48 hours of commencement of the background check, Clovity will receive reports of completion from background check company and E-Verify. (1-2 hours)	Head of HR
If candidate compliance is confirmed on these reports, Project Manager will reach out to procurement and HR to start the on-boarding process and share all pertinent documents for their records. (Depends on client response speed – 1 hour)	Project Manager
Selected resource's Hardware is ordered either for onsite delivery or remote work per the client's determination. (Depends on client response speed – 1-4 hours)	Head of HR
Candidate begins to get system access set up through facilitation of client stakeholders and Clovity's Project Manager.	Project Manager



Day 6/7: Timelines	
Once system access and hardware are procured, the resource(s) can start. This will be depending on the client’s capability to have them start. Clovity will follow all predetermined start dates agreed upon during the procurement process or can start the resource ASAP.	<i>Head of HR</i>
Our Head of HR will check in with the resource Day 1 over a call, as well as check in daily for the first week of the project.	<i>Head of HR</i>
Post Placement Actions Timeline	
Director of Client Management will facilitate weekly and monthly governance calls or meetings with resource, client, and both resource as well as client to ensure that quality is high, and performance is at its optimal level. (1-4 hours per month) These will be held throughout the duration of the contract period but will be conducted based on the client’s schedule to ensure their ability to attend when required.	<i>Director of Client Management</i>
Performance reviews will be conducted by the Director of Client Management on a Quarterly basis but can be done as often as a monthly or weekly basis if project or client needs determine it to be necessary.	<i>Director of Client Management</i>
Weekly, monthly, quarterly, bi-annually, or annual reports can be provided to the client per their specific organizational standard requirement or by department standard.	<i>Director of Client Management</i>

Commitment to Client Communication:

• Open Communication Channels
Clovity is fully committed to being available for all essential meetings and communications with the City’s evaluation team . Our team will ensure timely and responsive engagement throughout the recruitment process, facilitating effective collaboration and alignment with the City’s objectives. We are dedicated to providing consistent support and are prepared to meet as frequently as necessary to ensure the successful selection of the ideal City Administrator.



North Branch Request for Proposals: Executive Search Firm

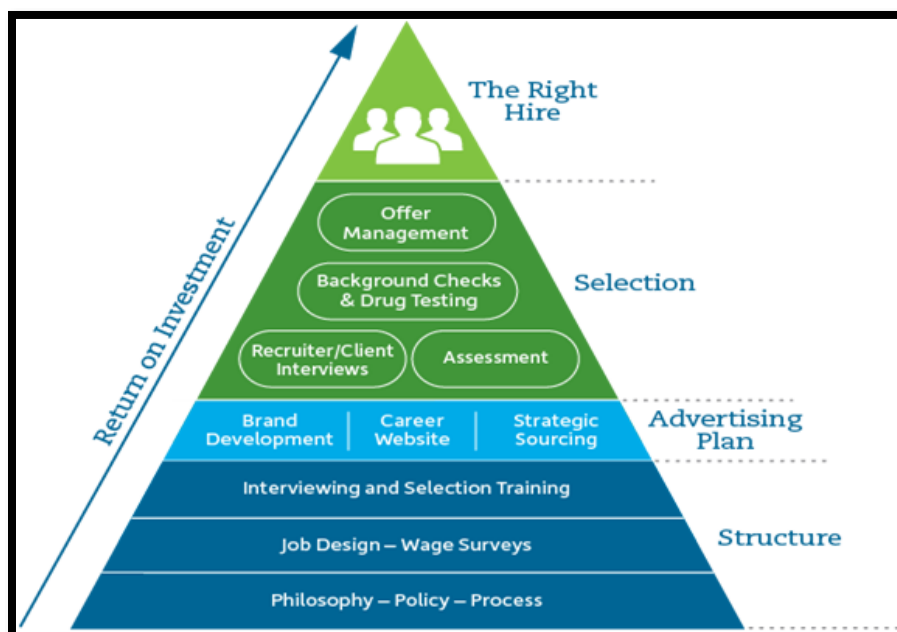
Clovity Executive Search Team for The City of North Branch:

Name	Title	Years of Experience
Cameron Starman	Director of Client Management	11+ years
Prahlad Singh Dogra	Head of Delivery (Project Manager for The City of North Branch)	13+ Years
M Imran Z Khan	Sr. Recruiting Manager	13+ Years
Priyanka Pawar	Head of HR	12+ Years

We typically try to achieve all of the above within **24 – 48 hrs** of receiving the candidate requirement. Depending on the niche and availability of candidates, it could take another day or so. If for some reason a resource is replaced due to performance reasons, Clovity will not charge the City of North Branch for that initial day. The Clovity team works tirelessly to ensure that every candidate is a good fit so likely this scenario will not happen. However, if it does, we will act accordingly and at our own cost to fix this.

Clovity defines quality as the ability to establish ongoing relationships through providing processes and continuously improved services to satisfy better the needs of the City of North Branch, candidates, and our employees. Our goal is to deliver services in accordance with our client's requirements and expectations and to provide a work environment that positively contributes to our employees' well-being. This is the Clovity "**Win-Win-Win**" philosophy for our employees, clients as well as ourselves.

This philosophy is a critical component of the Clovity management approach as it ultimately results in cost savings for our clients. It has contributed significantly to our success and longevity with our clients, candidates, and employees.





Budget and Deliverables

Clovity’s Response: We charge once the candidate is placed.

Our goal is to facilitate a clear understanding of all costs associated with our services, ensuring that there are no surprises and that the city of North Branch is fully informed at every stage.

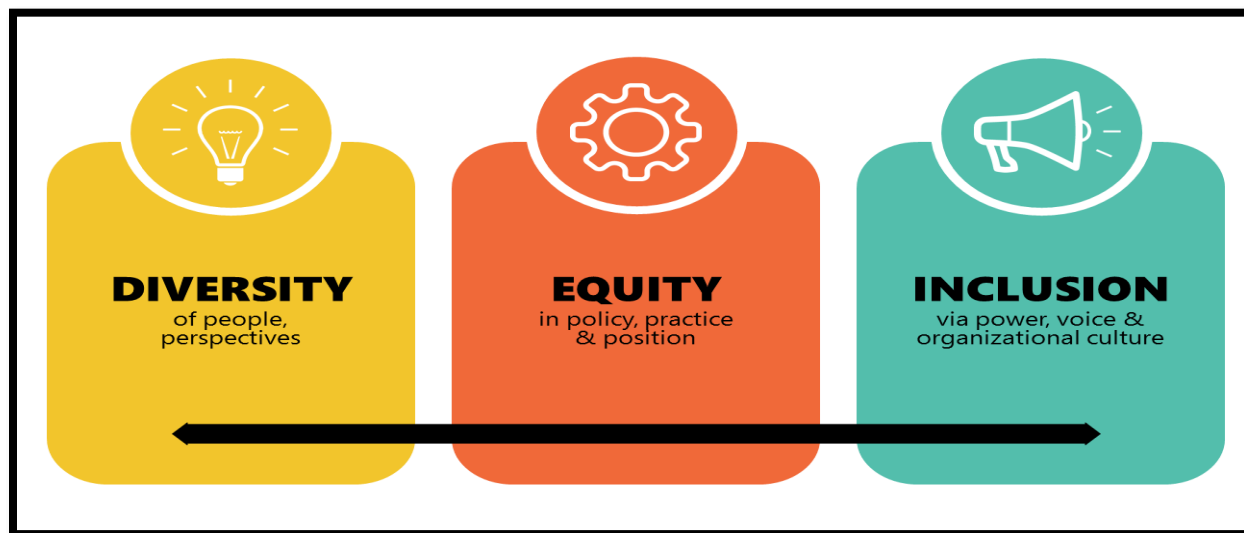
The table below explains the cost of the services rendered for the executive searched:

Services	Cost Per Placement
Developing recruitment strategies and timelines	\$1,000.00
Developing Accurate and Enticing Job Profiles and Customized Brochures	\$1,500.00
Conducting Targeted Recruitment	\$1,000.00
Thorough Search, Advertisements of Positions	\$1,500.00
Receiving and Processing Application	\$1,000.00
Screening of Applications	\$1,700.00
Credential Verification and Background Referencing	\$2,000.00
Interviews	\$1,600.00
Background and Reference Checks	\$2,200.00
Total Cost	\$13,500.00

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Commitment to diversity, equity, and inclusion.



Clovity's Response: It's a proactive strategy to build a workforce that reflects the variety of backgrounds and experiences in the marketplace. Here's a quick rundown:

- **Focus:** Diversity staffing widens the candidate pool to include people from different races, genders, ethnicities, ages, abilities, sexual orientations, and more.
- **Benefits:** A diverse team brings a wealth of perspectives and ideas to the table. This can lead to:
 - **Enhanced creativity and problem-solving**
 - **Stronger decision-making**
 - **Improved innovation**
 - **Better understanding of a wider customer base**
- **Beyond Hiring:** It's not just about recruitment. Diversity staffing aims to create an inclusive work environment where everyone feels valued and has the opportunity to thrive.

Here are some ways Clovity achieve diversity staffing:

- **Partnerships:** Working with recruitment & staffing agencies specializing in diverse candidates.
- **Outreach:** Attending job fairs and networking events focused on underrepresented groups.
- **Inclusive Job Postings:** Using language that welcomes all backgrounds and avoiding biased wording.
- **Unconscious Bias Training:** Educating hiring managers to recognize and overcome unconscious biases in the interview process.

Clovity believe that diversity in staffing is a mutually beneficial endeavour. Not only does it cultivate a more equitable and enriching workplace, but it also elevates a company's performance and competitive edge. We are deeply committed to nurturing a workplace culture that champions diversity, equity, and inclusion, ensuring that every employee feels valued, respected, and empowered to excel. Our comprehensive DEI



plan for staffing comprises a spectrum of initiatives designed to foster diversity across all echelons of the organization and establish an environment conducive to the flourishing of every individual. Here's an outline of our primary strategies:

Recruitment and Hiring Practices:

- Implementing a comprehensive diversity recruitment strategy to attract candidates from diverse backgrounds.
- Utilizing technology-driven solutions to remove bias from the hiring process, such as anonymized resume screening and structured interview protocols.

Partnerships and Outreach:

- Establishing partnerships with diverse professional organizations, minority-serving institutions, and community groups to expand our talent pipeline.
- Actively participating in job fairs, conferences, and networking events focused on diversity and inclusion to connect with top talent.

Training and Education:

- Providing unconscious bias training for hiring managers and interviewers to mitigate bias in decision-making processes.
- Offering diversity awareness training for all employees to promote understanding and inclusion in the workplace.

Employee Resource Groups (ERGs):

- Supporting and amplifying the voices of our Employee Resource Groups, which provide a platform for employees from underrepresented groups to network, share experiences, and drive positive change.
- Encouraging cross-functional collaboration and allyship through participation in ERG events and initiatives.

Inclusive Policies and Benefits:

- Ensuring our policies and benefits are inclusive and equitable, including flexible work arrangements, parental leave policies, and healthcare benefits that meet the diverse needs of our workforce.
- Providing accommodations and support for employees with disabilities to ensure equal access to opportunities and resources.

Leadership Accountability:

- Holding leadership accountable for advancing diversity, equity, and inclusion goals through regular performance evaluations and progress reviews.
- Encouraging leadership to lead by example and actively champion DEI initiatives within their respective teams and departments.



Measurement and Reporting:

- Establishing metrics to track progress on diversity goals, including workforce representation, hiring demographics, and retention rates.
- Conducting regular diversity assessments and reporting findings to senior leadership to drive accountability and transparency.

Continuous Improvement:

- Soliciting feedback from employees through surveys, focus groups, and town hall meetings to identify areas for improvement and innovation in our DEI efforts.
- Remaining agile and responsive to emerging trends and best practices in diversity, equity, and inclusion to continuously evolve our strategies.

Clovity acknowledge that diversity isn't just a moral obligation; it's also a strategic advantage. By fostering an inclusive culture where everyone feels a sense of belonging, we enhance our capacity to drive innovation, creativity, and excellence across all aspects of our operations. Clovity is deeply committed to practicing diversity and inclusion not only in our procurement processes but also in our interactions with individuals. We communicate this commitment to the City of North Branch and explore alternative avenues to fulfil mutual diversity objectives.

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Experience and commitment to facilitate Council and stakeholder consensus.

Clovity’s Response: Clovity brings extensive experience and a steadfast commitment to facilitating consensus among the City Council and key stakeholders. Our proven approach ensures that all voices are heard and that a unified vision is achieved. We are dedicated to fostering collaboration and alignment, leveraging our expertise to guide productive discussions and build a cohesive strategy for the successful recruitment of the City Administrator.

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Track record of effective community engagement.

Clovity’s Response: Clovity takes pride in our proven track record of fostering meaningful community engagement. Through strategic outreach initiatives, inclusive stakeholder consultations, and transparent communication channels, we have consistently facilitated dialogue and collaboration between municipal leadership and diverse community stakeholders.

Here is a case study of one of our clients, demonstrating our ability to successfully involve community stakeholders in the recruitment process.

This example highlights our commitment to ensuring that community input is integral to selecting the ideal candidate.

Client: State of Massachusetts (EOHHS)	
About:	This agency oversees a range of programs related to health, well-being, and social services for Massachusetts residents. EOHHS works to ensure access to healthcare, substance abuse treatment, support for older adults and individuals with disabilities, and various financial and nutritional programs. Essentially, their aim is to promote the health and independence of a large portion of the state's population 
Contract Details:	Clovity currently holds a contract with the State of Mass - Executive office of Health and Human Services (EOHHS) to provide Executive Recruitment services and Non-IT staffing services to various State Government agencies of the State of MA. We are qualified to provide the required services for over 40+ major Executive and Non-IT categories including but not limited to: City Administrator, Mayors, Chief Information Officer (CIO), Chief Financial Officer (CFO), Administrative Advanced Secretary, Accounting Manager etc.
Services Provided:	We have successfully delivered Executive recruitment services and Non-IT staff for multiple projects for the State of MA (EOHHS). Below provided are the descriptions of some of the services provided. Title: City Administrator Description of services provided: As City Administrators, we play a pivotal role in leading and strategizing the city's administrative functions and operations. Our responsibilities include overseeing daily municipal operations, developing policies and strategies aligned with the City Council's objectives, and ensuring the effective delivery of public services. We manage municipal budgets, oversee department heads, and ensure compliance with regulations and ordinances. Additionally, we collaborate with community stakeholders, prioritize city projects, optimize resources, and drive initiatives that support the city's growth and enhance the quality of life for residents. Title: City Mayor Description of services provided: As City Mayors, we play a pivotal role in leading and strategizing the municipality's initiatives and policies. Our responsibilities include overseeing city operations, developing strategies aligned with



community objectives, and ensuring the well-being and safety of residents. We evaluate emerging community needs, manage municipal budgets, and lead urban development efforts. Additionally, we collaborate with stakeholders to prioritize city projects, optimize municipal resources, and drive innovation to support the growth and success of the city.

Title: Chief Information Officer (CIO)

Description of services provided:

As Chief Information Officers (CIOs), we play a pivotal role in leading and strategizing the organization's information technology initiatives. Our responsibilities include overseeing IT operations, developing technology strategies aligned with business objectives, and ensuring the security and integrity of data and systems. We evaluate emerging technologies, manage IT budgets, and lead digital transformation efforts. Additionally, we collaborate with stakeholders to prioritize IT projects, optimize IT infrastructure, and drive innovation to support organizational growth and success.

Title: Chief Financial Officer (CFO)

Description of services provided:

As Chief Financial Officers (CFOs), we provide strategic financial leadership and guidance to the organization. Our responsibilities include overseeing financial planning and analysis, managing financial risks, and ensuring compliance with regulatory requirements. We develop and implement financial strategies to support organizational goals, optimize capital allocation, and enhance shareholder value. Additionally, we provide insight and recommendations to senior management on financial decisions and investments. With our expertise in financial management and governance, we contribute to the overall financial health and success of the organization.

Title: Accounting Manager

Description of services provided:

As Accounting Managers, we oversee the financial operations of the organization and ensure compliance with accounting principles and regulations. Our services include managing financial reporting processes, preparing budgets and forecasts, and overseeing accounts payable and receivable functions. We analyse financial data to provide insights for decision-making and support strategic planning initiatives. Additionally, we liaise with auditors, tax authorities, and other stakeholders to ensure accurate financial reporting and regulatory compliance.

Success and Awards:

Clovity has achieved 100% success in completion of all the requirements asked by the Mass's EOHHS with-in the defined timeframe and evaluated budget till date.



Here is the feedback form from one of our clients:

PAST PERFORMANCE QUESTIONNAIRE

Washington County is requesting past performance review. The vendor listed below has identified you as a client for which they have previously performed work for. We would appreciate you taking the time to complete this survey.

Part A: Vendor Name
Name of the Vendor: CLOVITY. INC

Part B: Project Background
Client Name: EOHHS IT, COMM OF MA
Project Description: STAFF AUG MASTER SERVICE AGREEMENT ITS77
Location (City/State): MASSACHUSETTS
Date Complete: ITS77 ENDS 2027
Project Length: CONTRACT LENGTH IS 3 YEARS AND 2 YR EXTENSIONS

Part C: Reference Evaluation
Please rate your level of satisfaction in the table below using 1-10 (With 10 representing that you were very satisfied and 1 representing that you were very unsatisfied.).

Criteria	Unit	Rating
Ability to manage contractors	1-10	10
Quality of submittals (contractor candidates)	1-10	10
Overall performance of contractor	1-10	10
Your overall customer satisfaction	1-10	10

Please provide any additional comments (consider: anything you would do differently, the greatest challenges/problems encountered, accomplishments, etc.):

CLOVITY does an exceptional job finding the appropriate candidates for submissions. Their candidates are professional, skilled, and excellent performers. The only problem we encountered was with the time sheet process. Our process is unique for vendors and their back office team communicated with our accounting department and was able to come up with a solution for both sides, this was a first for our accounting department, and a process which we incorporated with other vendors as well. Clovity are great communicators with their own departments as well as ours. I highly recommend them.

Kara Banderier

Staffing Coordinator

781-248-9422

Kara Banderier

Printed Name of Evaluator

Title

Phone Number

Signature

Thank you for taking the time to complete this survey and assist us in this important endeavor.
Please return the completed survey to: certifications@clovity.com

Vendor return information





References

Clovity’s Response:

Client: State of Massachusetts (EOHHS)	
Point of Contact	
Name	Partha Gajula
Title	Director
Phone number	781-775-7360
Email	Partha.gajula2@mass.gov
About:	
This agency oversees a range of programs related to health, well-being, and social services for Massachusetts residents. EOHHS works to ensure access to healthcare, substance abuse treatment, support for older adults and individuals with disabilities, and various financial and nutritional programs. Essentially, their aim is to promote the health and independence of a large portion of the state's population	
	
Contract Details:	
Clovity currently holds a contract with the State of Mass - Executive office of Health and Human Services (EOHHS) to provide Executive Recruitment services and IT/Non-IT staffing services to various State Government agencies of the State of MA. We are qualified to provide the required services for over 40+ major Executive and Non-IT categories including but not limited to: City Administrator, Mayors, Chief Information Officer (CIO), Chief Financial Officer (CFO), Accounting Manager, Project Manager etc.	
Services Provided:	
We have successfully delivered Executive recruitment and Non-IT staff for multiple projects. Below provided are the descriptions of some of the services provided.	
Title: City Administrator	
Description of services provided:	
As City Administrators, we play a pivotal role in leading and strategizing the city's administrative functions and operations. Our responsibilities include overseeing daily municipal operations, developing policies and strategies aligned with the City Council's objectives, and ensuring the effective delivery of public services. We manage municipal budgets, oversee department heads, and ensure compliance with regulations and ordinances. Additionally, we collaborate with community stakeholders, prioritize city projects, optimize resources, and drive initiatives that support the city's growth and enhance the quality of life for residents.	
Title: City Mayor	
Description of services provided:	
As City Mayors, we play a pivotal role in leading and strategizing the municipality's initiatives and policies. Our responsibilities include overseeing city operations, developing strategies aligned with community objectives, and ensuring the well-being and safety of residents. We evaluate emerging community needs, manage municipal budgets, and lead urban development efforts. Additionally, we collaborate with stakeholders to prioritize city projects, optimize municipal resources, and drive innovation to support the growth and success of the city.	



Title: Chief Information Officer (CIO)

Description of services provided:

As Chief Information Officers (CIOs), we play a pivotal role in leading and strategizing the organization's information technology initiatives. Our responsibilities include overseeing IT operations, developing technology strategies aligned with business objectives, and ensuring the security and integrity of data and systems. We evaluate emerging technologies, manage IT budgets, and lead digital transformation efforts. Additionally, we collaborate with stakeholders to prioritize IT projects, optimize IT infrastructure, and drive innovation to support organizational growth and success.

Title: Chief Financial Officer (CFO)

Description of services provided:

As Chief Financial Officers (CFOs), we provide strategic financial leadership and guidance to the organization. Our responsibilities include overseeing financial planning and analysis, managing financial risks, and ensuring compliance with regulatory requirements. We develop and implement financial strategies to support organizational goals, optimize capital allocation, and enhance shareholder value. Additionally, we provide insight and recommendations to senior management on financial decisions and investments. With our expertise in financial management and governance, we contribute to the overall financial health and success of the organization.

Title: Accounting Manager

Description of services provided:

As Accounting Managers, we oversee the financial operations of the organization and ensure compliance with accounting principles and regulations. Our services include managing financial reporting processes, preparing budgets and forecasts, and overseeing accounts payable and receivable functions. We analyse financial data to provide insights for decision-making and support strategic planning initiatives. Additionally, we liaise with auditors, tax authorities, and other stakeholders to ensure accurate financial reporting and regulatory compliance.

Title: Project Managers

Areas of Responsibilities:

Our Project Managers lead and oversee projects from initiation to completion, ensuring they are delivered on time, within budget, and according to specifications. We develop project plans, define scope, set objectives, and allocate resources effectively. Additionally, we facilitate communication among team members, stakeholders, and clients to ensure alignment and transparency throughout the project lifecycle. We monitor project progress, identify risks, and implement mitigation strategies to keep projects on track. With our strong leadership, organizational, and problem-solving skills, we drive project success and contribute to organizational growth and success.

Success and Awards:

Clovity has achieved 100% success in completion of all the requirements asked by the Mass's EOHS with-in the defined timeframe and evaluated budget till date.



Client: Capitol One	
Point of Contact	
Name	Kumar Ghosh
Title	Senior Director
Phone number	510-926-8790
Email	Kumar.Ghosh@capitalone.com
About:	
Capital One in Illinois, was founded on the belief that no one should be locked out of the financial system. Their deep commitment to financial inclusion is reflected in their business, community partnerships, philanthropy, and most importantly, support for the customers.	
Contract Details:	
Clovity is serving Recruitment services and IT/Non-IT staffing services spanning multiple divisions. All of our resources have been working at a very high level and we have, with this group as well, built a strong reputation for great candidates. List of the resources we serve but not limited to: Chief Human Resources Officer (CHRO), City Administrator, County Administrator, Chief Operating Officer (COO), Director, Administrative Assistant and others.	
Services Provided:	
We have successfully delivered Executive Recruitment and Non-IT staffing for projects for the Capital One . Below provided are the descriptions of some of the services provided.	
Title: Chief Human Resources Officer (CHRO)	
Description of services provided:	
As Chief Human Resources Officers (CHROs), we provide strategic leadership in all aspects of human resource management. Our services include developing HR strategies, overseeing recruitment and talent management initiatives, managing employee relations, and fostering a positive organizational culture. We ensure compliance with labour laws and regulations and provide leadership and support for training and development programs. With our focus on attracting, developing, and retaining top talent, we contribute to organizational success and growth.	
Title: City Administrator	
Description of services provided:	
As City Administrators, we play a pivotal role in leading and strategizing the city's administrative functions and operations. Our responsibilities include overseeing daily municipal operations, developing policies and strategies aligned with the City Council's objectives, and ensuring the effective delivery of public services. We manage municipal budgets, oversee department heads, and ensure compliance with regulations and ordinances. Additionally, we collaborate with community stakeholders, prioritize city projects, optimize resources, and drive initiatives that support the city's growth and enhance the quality of life for residents.	
Title: County Administrator	
Description of services provided:	
As County Administrators, we play a pivotal role in leading and strategizing the county's overall operations and administrative functions. Our responsibilities include overseeing daily operations, developing and implementing policies aligned with the county's goals, and ensuring the efficient	



delivery of public services. We manage county budgets, coordinate with various departments, and ensure compliance with legal and regulatory requirements. Additionally, we engage with stakeholders to address community needs, optimize resources, and drive initiatives that support the county’s growth and well-being.

Title: Chief Operating Officer (COO)

Description of services provided:

As Chief Operating Officers (COOs), we provide executive leadership in managing the day-to-day operations of the organization. Our services include developing and implementing operational strategies, optimizing processes, and ensuring efficient resource allocation. We oversee various functional areas such as production, supply chain, and facilities management to drive organizational effectiveness and profitability. Additionally, we collaborate with other executives to align operational activities with overall business objectives and drive sustainable growth.

Title: Director

Areas of Responsibilities:

In the state of Massachusetts, we have recruited a Director who plays a pivotal role in overseeing strategic initiatives, managing departmental operations, and ensuring compliance with state regulations. Responsibilities often include budget oversight, policy development, and stakeholder engagement.

Title: Administrative Assistant

Description of services provided:

Our Administrative Assistants provide essential support to ensure the smooth operation of office functions. Our services include managing correspondence, scheduling appointments, and maintaining files and records. We assist with various administrative tasks, such as data entry, word processing, and preparing reports and presentations. Additionally, we handle inquiries, coordinate meetings, and provide support to staff as needed. With our organizational skills and attention to detail, we contribute to enhancing efficiency and productivity within the organization.

Success and Awards:

Clovity has achieved 100% success in completion of all the requirements asked by Agency with-in the defined timeframe and evaluated budget till date.

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Client: State of Massachusetts	
Point of Contact	
Name	Swathi Mall
Title	Project Manager
Phone number	917-288-7549
Email	malls@dor.state.ma.us
About Agency:	
This department is responsible for the state's transportation infrastructure, including roads, bridges, public transportation systems, and airports. Their mission is to provide safe, reliable, and efficient transportation options for the people of Massachusetts. This not only improves daily commutes but also strengthens the state's economy by ensuring the smooth flow of goods and services.	
	
Contract Details:	
Clovity is providing recruitment solutions and Non-IT staffing services to State of Massachusetts (DOR) for executive (C-Suite) and other pivotal leadership roles which includes but not limited to: City Administrator, City Mayor, Chief Financial Officer (CFO), Director, Vice President of Operations, Accounting Manager etc	
Services Provided:	
We have successfully delivered Executive recruitment and Non-IT staff for multiple projects. Below provided are the descriptions of some of the services provided.	
Title: City Administrator	
Description of services provided:	
As City Administrators, we play a pivotal role in leading and strategizing the city's administrative functions and operations. Our responsibilities include overseeing daily municipal operations, developing policies and strategies aligned with the City Council's objectives, and ensuring the effective delivery of public services. We manage municipal budgets, oversee department heads, and ensure compliance with regulations and ordinances. Additionally, we collaborate with community stakeholders, prioritize city projects, optimize resources, and drive initiatives that support the city's growth and enhance the quality of life for residents.	
Title: City Mayor	
Description of services provided:	
As City Mayors, we play a pivotal role in leading and strategizing the municipality's initiatives and policies. Our responsibilities include overseeing city operations, developing strategies aligned with community objectives, and ensuring the well-being and safety of residents. We evaluate emerging community needs, manage municipal budgets, and lead urban development efforts. Additionally, we collaborate with stakeholders to prioritize city projects, optimize municipal resources, and drive innovation to support the growth and success of the city.	
Title: Chief Financial Officer (CFO)	
Description of services provided:	
As Chief Financial Officers (CFOs), we provide strategic financial leadership and guidance to the organization. Our responsibilities include overseeing financial planning and analysis, managing financial risks, and ensuring compliance with regulatory requirements. We develop and implement financial	



strategies to support organizational goals, optimize capital allocation, and enhance shareholder value. Additionally, we provide insight and recommendations to senior management on financial decisions and investments. With our expertise in financial management and governance, we contribute to the overall financial health and success of the organization.

Title: Director

Areas of Responsibilities:

In the state of Massachusetts, we have recruited a Director who plays a pivotal role in overseeing strategic initiatives, managing departmental operations, and ensuring compliance with state regulations. Responsibilities often include budget oversight, policy development, and stakeholder engagement.

Title: Vice President of Operations

Areas of Responsibilities:

In the role of Vice President of Operations, we focus on optimizing the efficiency and effectiveness of organizational processes. Our services encompass overseeing day-to-day operations, resource management, and performance optimization. We develop and implement strategies to streamline workflows, enhance productivity, and improve quality standards. Additionally, we monitor key performance indicators, identify areas for improvement, and implement best practices to drive operational excellence. With our leadership and strategic guidance, we aim to achieve operational efficiency, reduce costs, and support organizational growth and success.

Title: Accounting Manager

Description of services provided:

As Accounting Managers, we oversee the financial operations of the organization and ensure compliance with accounting principles and regulations. Our services include managing financial reporting processes, preparing budgets and forecasts, and overseeing accounts payable and receivable functions. We analyse financial data to provide insights for decision-making and support strategic planning initiatives. Additionally, we liaise with auditors, tax authorities, and other stakeholders to ensure accurate financial reporting and regulatory compliance

Success and Awards:

Clovity has achieved 100% success in completion of all the requirements asked by the Mass’s DOR with-in the defined timeframe and evaluated budget till date.

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Thank You

Contact Us:

Headquarter Address:

11501, Dublin Blvd., #200, Dublin, California - 94568

Minnesota Office Address:

**Owatonna, Minnesota 202 n cedar Ave, #1 Owatonna, Mn
55060**

Phone Number:

510-916-1697

Email:

procurement@clovity.com

Web Address:

www.clovity.com





MAY 2024

City Administrator Recruitment Proposal

FOR THE CITY OF NORTH BRANCH, MN

PRESENTED BY

Greg M. Prothman

President, GMP Consultants

GMP CONSULTANTS

Greg@gmphr.com

(206) 714-9499

www.gmphr.com



Proposal Title: GMP Consultants
City of North Branch
City Administrator Recruitment Proposal

Company: GMP Consultants
7041 Cascade Ave SE
Snoqualmie, WA 98065

Contact: Greg Prothman
President
206 714 9499
greg@gmphr.com

Submittal Date: May 6, 2024

May 6, 2024

Mr. Kevin Schieber
Mayor
City of North Branch
6408 Elem Street
North Branch, MN 55056

Dear Mayor Schieber,

Thank you for the opportunity to provide a proposal to assist the City of North Branch with the recruitment of its next City Administrator. We are well positioned to assist the City with this important recruitment as we have recently completed successful recruitments for the City of Oak Park Heights, City Administrator and the City of Brainard, City Administrator.

GMP MISSION AND VALUES

GMP Consultants Mission is to provide exceptional executive search, interim placements, and organizational consulting services to partner with our clients to provide the highest quality services to their residents.

GMP Consultants are all former public sector management practitioner who were selected not only because of their specific expertise in management but also because of their commitment to providing quality local government services and adherence to the ethics of the International City Managers Association.

Our focus as a Company is to first understand the values and vision of our local government clients and then source quality candidates who best fit with the community. GMP believes in the tenets of quality management such as good communication and teamwork, transparency, respect and community values as a foundation for providing excellent municipal services. Our consultants endeavor to model these behaviors with all clients with whom we partner with, and we believe this philosophy aligns well with the City of North Branch's Values and Vision of providing thier residents with an excellent quality of life

ABOUT GMP CONSULTANTS

GMP Consultants is a public sector executive search firm with a collective 225 years of local government leadership experience with both regional and national relationships. GMP Consultants offer our clients experienced subject matter experts with a solid understanding of local government coupled with decades of experience. We have served in a wide range of executive positions, from city and county management to public works, management information systems, and finance.

Our Qualifications

Founded and led by Greg M. Prothman, formerly the CEO of Prothman, GMP consultants have worked on over 600 executives searches including 150 city/county management searches. All our senior search consultants are active in both ICMA and local state level city management associations or in their respective professional associations.

Our Philosophy

Our business philosophy centers on the understanding that this is a "people" related industry. We have a reputation for providing superior service and building lasting relationships with both clients and candidates. We believe that attention to others' needs is the key to effective customer service.

Why Choose GMP?

What you get with GMP Consultants is personal service. You appreciate it when phone calls are returned, projects stay on schedule and your challenges are given thorough and creative thinking. While other companies may assign your business to lesser experienced staff, we offer exceptional service from senior-level consultants.

- **Service & Relationship** - Our consultants bring a reputation for providing outstanding service and building lasting relationships with both clients and candidates.
- **Customized Solutions** - We take the time to become familiar with your organization to ensure that we offer the best solution and not just a single service.
- **People First** - We work closely with you and your candidates through every stage of the recruitment process, creating a welcoming candidate experience and ensuring an effective recruitment outcome.
- **Team Approach** – With 12 former city managers from across the nation our consulting group works as a team to leverage their networks to assist with each assignment and give your challenges thorough and creative thinking.
- **Minnesota City Management Experience** - Our consultants are seasoned and successful Minnesota state city manager practitioners with long-term tenures and extensive experience in conducting national searches

Project Team Members

Jeff Weldon - Lead Project Consultant

Jeff served 29 years in municipal management in Minnesota and South Dakota including city administrator for Redwood Falls, MN; and assistant city administrator for Apple Valley, MN as well as city manager for Brookings and Yankton, SD. Jeff was also an adjunct instructor at South Dakota State University in Public Administration and State and Local Government. Jeff currently serves local government managers in Minnesota and South Dakota with career and professional development as a Senior Advisor for the state associations. Jeff holds a Bachelor's Degree from Minnesota State University and a Master's Degree from Hamline University. He was active with the Coalition of Greater Minnesota Cities, Minnesota City/County Management Association, South Dakota Municipal League, and the International City Management Association (ICMA). Jeff is a strong advocate for community involvement and has been involved with his church, the United Way, Rotary and Lions clubs, and the Chamber of Commerce. Jeff and his wife, Tracie, have two grown children and five grandchildren. His hobbies and spare time activities include camping, boating, fishing, golf, travel, woodworking, pencil sketching and reading presidential biographies and Civil War history.

Matt Fulton – Co Project Consultant

Matt brings over 30 years of local government leadership experience serving as a city manager in small (7,000 pop.) and large organizations (65,000 pop.) in Minnesota and Wisconsin. He has worked in suburban and full service environments as well as in fully developed and fast growing communities. During his career, Matt has had the opportunity to provide leadership at the local, state, national, and International levels, including serving as a Regional Vice President on the ICMA Executive Board of Directors, a member on the Minnesota League of Cities Board of Directors, and as President of the Minnesota City/County Management Association. He is recognized as an innovative and proactive professional, with a focus on strengthening civic engagement and assessing organizational and community performance. Over the past four years, he has served as Polco's VP for National Engagement, helping local governments build stronger engagement approaches and assessing performance, from the perspective of residents and community stakeholders. His continual engagement with community leaders across the country has helped him strengthen his already strong national network of talented local government professionals and organizational connections. Matt has a Master's degree in Public Administration from the University of Wisconsin and an undergraduate degree in urban planning from the University of Minnesota.

Kate Hansen – Recruitment Manager

Kate is a certified Project Management Professional (PMP) with a background in business, nonprofit, and fire administration. She has served as a Public Records Officer as well as a political campaign manager, and brings a distinguishing blend of attention to detail, creativity, and critical thinking. Kate holds a B.A. in Theatre from Chapman University with an emphasis on stage management.

Sarah Marsh – Content Designer

Sarah brings a background across nonprofit, business, government, and education sectors. She holds an M.B.A in Organizational Behavior & Development from the University of Vermont. She also publishes in the field of American History and is the author of two books honored by the National Council for the Social Studies.

Brenda Gabbittas - Candidate Manager

Brenda has over a decade of experience working with many communities around the globe in both public and private sectors. She leans on her experiences to build lasting relationships with everyone she works with while delivering unparalleled levels of service. Brenda holds a Bachelor's of Education in Early Childhood Development from Utah Valley University.

We believe our proven process provides a best practices approach to attracting high quality candidates and ensuring a good fit for your organization. As the leader in public sector executive search, we stand by our work by offering an **18-month guarantee** on your selection!

If you have any questions or would like to discuss your specific needs, please do not hesitate to contact me at (206)714-9499 or Greg@gmphr.com. I look forward to hearing from you and hope to have the opportunity to work together soon.

Sincerely,



Greg M. Prothman
President
GMP Consultants

GMP Consultants

City of North Branch

City Administrator Recruitment Proposal

METHODOLOGY & SCOPE OF WORK

GMP Consultants have conducted hundreds of successful executive searches refining our process along the way. We provide the workplan, but you are in charge. We customize every recruitment to meet your needs. We partner with you to find a highly qualified candidate who is the perfect "fit" for your organization, we promise!

Information Gathering & Recruitment Profile Development

Review and Finalize Search Process and Schedule

We'll meet with the City Council to review:

- The project scope of work and process
- Project schedule
- Identify the geographic scope of the recruitment
- Review the compensation package
- Identify key stakeholders
- Identify a staff contact in addition to the Mayor to ensure timely communication and information transfers

Profile Research and Stakeholder meetings

Our goal is to thoroughly understand your organization, current challenges, preferred qualifications as well as the timeline for this recruitment. We would ask to meet with:

- City Council members individually
- Management team
- Advisory Boards & Commission members
- Selected community members
- Municipal Partners (County, School District etc.)
- Business leaders including the Chamber of Commerce
- Other stakeholders as identified
- Review the current job duties and update as needed
- Review all relevant documents

City Administrator Job Description Update and Adoption

Based on information from interviews with the City Council and other stakeholders, we will facilitate the adoption of a City Administrator job description.

Develop, Review, and Approve a Detailed Recruitment Profile & Invitation

We'll create a detailed recruitment profile highlighting the strengths of your job opportunity. If requested, we will assist in reviewing the position compensation and will make recommendations that are consistent with comparable agencies and the market. Examples of prior recruitment profiles are included in this proposal and typically feature the following:

- Why Apply?
- The Organization & Position
- The Ideal Candidate
- Challenges & Opportunities
- Compensation & Benefits
- Your social media (if applicable)

Strategic Marketing

Targeted Recruitments - Having 20 plus years of designing and implementing national recruitments, GMP Consultants will create and conduct a nationwide recruitment and candidate generation process, employing recruitment strategies designed to encourage competitive applicants from diverse backgrounds and experiences. We have been successful in identifying a candidate pool that is racially, ethnically, and gender diverse.

We will develop a national advertising strategy placing ads in websites, job boards, periodicals, and social media such as LinkedIn.

- Intl. City Managers Association (ICMA)
- League of Minnesota Cities
- Minnesota City Managers Association
- Wisconsin League of Municipalities
- Iowa League of Cities
- Illinois Municipal League
- Michigan Municipal League
- League of Nebraska Municipalities
- Indiana Associations of Towns & Cities
- Wisconsin City Managers Association
- Iowa City Managers Association
- Illinois City Managers Association
- Michigan City Managers Association
- Indiana City Managers Association
- National Forum for Black Public Administrators
- The League of Women in Government
- Local Government Hispanic Network
- Careers in Government
- Government Jobs
- GMP Job Board
- GMP LinkedIn Site

Development of Candidate Database for Direct Mail Invitations - We will mail approximately 500 to 700 letters of invitation to city managers/administrators in the mid-western United States. We will also email an invitation to apply to over 4000 city managers & administrators across the nation.

Candidate Screening and Short List Presentation

Candidate Application Materials - Candidates are asked to submit a cover letter, application, resume, answers to supplemental questions (designed to measure writing and thinking skills) and professional references.

Selection & Interview of Semifinalists - We review all candidate application materials and identify the most promising semifinalists. We conduct a one-hour interview with each semifinalist and provide written observations.

Search Work Session – We meet with you to review semifinalists (not to exceed 12). Prior to the meeting we send you each applicant's cover letter, resume, essay questions, the consultant semifinal interview notes, and candidate summary sheet. The City Council selects the finalist candidates and designs the final interviews.

Final Interviews and Selection

Design and Preparation of Final Interviews - We help you decide on the structure and schedule of the interviews, including the panel participants and facilitators. We tailor the process to fit your needs and prepare all the candidate materials for the interviews.

Reference & Background Checks - We conduct professional reference checks on each candidate, requesting the names of supervisors, subordinates, and peers. Background checks include Education Verification, Criminal History, Driving Record, and Sex Offender Check.

Candidate Travel - We help you identify which candidate travel expenses your organization wishes to cover and then work with the candidates to coordinate the most cost-effective travel arrangements.

Final Interviews & Selection - The City Council (and advisory panels if used) interview finalists. We facilitate a debrief with all panel participants. After the debrief, we facilitate the evaluation process, help the decision makers come to consensus, discuss next steps, and organize any additional candidate referencing or research. Our consultants have extensive experience in facilitating city councils and helping them come to consensus.

Candidate Appointment - We facilitate potential contract elements with the City Council. Once your top candidate has been selected, we will assist as needed with the job offer, contract negotiations, and employment agreement.

Commitment to Diversity, Equity and Inclusion

Local government serves all community members regardless of ethnicity, gender, race, background, or economy. We see firsthand how diversity and inclusion in the workforce enhances and enriches local governments' capacity to better understand, communicate, and serve all residents of their communities. GMP is proud of its record of providing our clients with diverse candidate pools. GMP's is committed to sourcing and actively seeking out diverse candidate pools leading to selections in senior level public sector positions.

RECRUITMENT SCHEDULE

Recruitments take approximately 90 days to complete, anticipate the project beginning the week of June 17th.

Kickoff Meeting	Week 1	North Branch & GMP: Meet to discuss timeline & search process
Profile Development	Week 1-2	GMP: Meet with key stakeholders & create position profile
Advertising	Weeks 3 - 7	GMP: Post online ads; send direct mailing
First Review	Week 8 -9	GMP: Conduct preliminary interviews with most promising candidates
Work Session	Week 10	GMP & North Branch: Meet to review semifinalists and choose finalist candidates
Final Interview Preparation	Week 11-12	GMP: Conduct background & reference checks, complete final Interviews schedule, coordinate travel with candidates
Final Interviews	Week 12	North Branch: Hosts finalist interviews North Branch: Makes hiring selection

BUDGET & DELIVERABLES

The fee for conducting a City Administrator recruitment is \$15,000. The professional fee covers all consultant and staff time required to conduct the recruitment. Expenses are additional. Professional fees are billed in three equal installments:

First Installment - \$5000

Project kick off meeting
Information gathering & recruitment profile development
Job Description Review
Strategic marketing completed

Second Installment - \$5000

Semifinal interviews completed
Candidate presentation work session completed

Third Installment - \$5000

Candidate selection & acceptance

The City will be responsible for reimbursing expenses incurred on the City's behalf which are billed monthly.

Expenses include:

- Websites, job boards and other advertising (est. \$1,600 - 1,900 est.)
- Direct mail announcements (est. \$1,400 - 1,900 est.)
- Consultant travel: Hotel, Mileage at IRS rate and \$65 per hour
- Background checks (est. \$225 per candidate)

Any additional work requested by the City beyond the scope of the proposal is billed at \$185 per hour. The City has the right to cancel the search at any time, the only responsibility would be the fees and expenses incurred prior to cancellation.

GUARANTEE & WARRANTY

Should the selected candidate leave the employment of the City within the first 18 months of appointment, we will conduct one additional recruitment for the cost of expenses only, if requested to do so within six months of the employee's departure. If the major elements of the process are followed and a candidate is not chosen, we will repeat the recruitment once with no additional professional fee, the only cost to you would be the expenses.

PROFESSIONAL REFERENCES

City of Blaine, MN pop. 70,000

Michelle Wolfe, City Manager
mwolfe@blainemn.gov
763 785 6121

Finance Director – just completed

Gunnison County, CO pop. 17,000+

Matthew Birnie, County Manager
MBirnie@gunnisoncounty.org
970-641-3061

County Manager

Asst. County Manager

City of Oak Park Heights, MN pop. 4,692

Mary McComber, Mayor
marymcomber@aol.com
(651) 351-7879

City Administrator - just completed

City of Belgrade, MT pop. 11,075

Neil Cardwell, City Manager
ncardwell@cityofbelgrade.net
406-388-3760

City Manager

Assistant City Manager – recently completed

CURRENT SEARCHES BY GMP CONSULTANTS

In progress Recruitments

City of Moab, UT

City Manager

City of Shady Grove, OR

City Administrator

City of Brainard, MN

Utilities Director

Greys Harbor County, WA

County Administrator

City of Scappoose, OR

City Manager

Crook County, OR

County Manager

Recently Completed

City of Brainard, MN

City Administrator

City of Oak Park Heights, MN

City Administrator

City of Blaine, MN

Finance Director

City of Belgrade, MT

Assistant City Manager

City of Canby, OR

City Administrator

City of Cottage Grove, OR

City Manager

City of Kennewick, WA

City Manager

Completed in the last 12 months

Gunnison County, CO

Assistant County Manager

City of Livingston, MT

City Manager

City of Lacey, WA

City Manager

City of Tumwater, WA

City Administrator

City of Sammamish, WA

City Manager

Lewis County, WA

County Manager

City of Pasco, WA

City Manager

All Management Recruitments by GMP Consultants & Managers

County of Los Alamos, NM

County Administrator

City of Spearfish, SD

City Administrator

City & Borough of Sitka, AK

Municipal Administrator

City & County of Broomfield, CO

Deputy City and County Manager

City of Astoria, OR

City Manager (2)

City of Arlington, WA

City Administrator

City of Polson, MT

City Manager

City of Bainbridge Island, WA

City Administrator

City of Bandon, OR

City Manager

City of Battle Ground, WA

City Manager (2)

City of Belgrade, MT

City Manager (2)

City of Louisville, CO

City Manager

City of Bothell, WA

Deputy City Manager

Assistant City Manager

City of Casper, WY

City Manager

Colorado Springs, CO

Assistant City Manager

Summit County, UT

County Manager

City of Chehalis, WA

City Manager (2)

City of Hailey, ID

City Administrator

City of Chelan, WA

City Administrator (3)

City of Rawlins, WY

City Manager

City of Clyde Hill, WA

City Administrator

City of Coburg, OR

City Administrator

City of College Place, WA

City Administrator

Town of West Yellowstone, MT

Town Manager (2)

City of Coquille, OR

City Manager

City of Covington, WA

City Manager

City of Damascus, OR

City Manager

City of Minot, ND

City Manager (2)

City of Sheridan, WY

City Administrator

City of DuPont, WA

City Administrator

City of Whitefish, MT

City Manager

City of Duvall, WA

City Administrator

Gunnison County, CO

County Manager

Assistant County Manager

City of Edgewood, WA

City Manager (2)

City of Ellensburg, WA

City Manager

City of Emeryville, CA

City Manager

City & Borough of Wrangell, AK

Borough Manager

City of Fife, WA

City Manager

City of Riverton, WY

City Administrator

City of Thorne Bay, AK

City Administrator

City of Gillette, WY

City Administrator

Inyo County, CA

Assistant/Deputy County

Administrator

County Administrative Office

City of Fircrest, WA

City Manager (2)

City of Connell, WA

City Administrator (2)

Town of Friday Harbor

City Administrator

City of Gig Harbor, WA

City Administrator

City of Gladstone, OR

City Administrator

City of Hermiston, OR

City Manager

City of Hood River, OR

City Manager

City of Issaquah, WA

City Administrator

Deputy City Administrator

City of Kelso, WA

City Manager

City of Carnation, WA

City Manager (2)

City of Kenmore, WA

City Manager (2)

City of Ketchum, ID

City Administrator

City of Lacey, WA

City Manager (2)

City of Lake Forest Park, WA

City Administrator (3)

City of Lake Oswego, OR

City Manager

City of Lake Stevens, WA

City Administrator

City of Lakewood, WA

City Manager

Assistant City Manager

City of Leavenworth, WA

City Administrator (2)

City of Lebanon, OR

City Manager

City of Lewiston, ID

City Manager

City of Livingston, MT

City Manager

City of Lincoln City, OR

City Manager

City of Longview, WA

City Manager

City of Lynden, WA

City Administrator

City of McMinnville, OR

City Manager

City of Mill Creek, WA

City Manager

City of Milwaukie, OR

City Manager

City of Newcastle, WA

City Manager (2)

City of McMinnville, OR

City Manager

City of Monroe, WA

City Administrator

City of Moses Lake, WA

City Manager (2)

City of Mountlake Terrace, WA

City Manager (3)

City of Mt. Angel, OR

City Manager

City of Mukilteo, WA

City Administrator

Management Services Director

City of Newcastle, WA

City Manager (2)

City of Normandy Park, WA

City Manager

City of Ontario, OR

City Manager

City of Othello, WA

City Administrator

City of Pasco, WA

City Manager (2)

Deputy City Manager

City of Port Angeles, WA

City Manager

City of Port Townsend, WA

City Manager

City of Post Falls, ID

City Administrator

City of Prosser, WA

City Administrator

City of South Lake Tahoe, CA

City Manager

City of Puyallup, WA

City Manager

City of Renton, WA

Chief Administrative Officer

City of Ridgefield, WA

City Manager

City of Bingen, WA

City Administrator

City of Sammamish, WA

City Manager (2)

City of Scappoose, OR

City Manager

City of Drain, OR

City Administrator

City of Canby, OR

City Administrator

City of Shelton, WA

City Administrator

Management Assistant

City of Shoreline, WA

City Manager (2)

Deputy City Manager

City of Spokane Valley, WA

City Manager

Deputy City Manager

City of Stanwood, WA

City Administrator

City of Stevenson, WA

City Administrator

City of Sultan, WA

City Administrator

City of Sun Valley, ID

City Administrator

City of Burns, OR

City Manager

City of Sunnyside, WA

City Manager

City of Toledo, OR

City Manager

City of Troutdale, OR

City Manager

City of Tumwater

City Administrator

City of Umatilla, OR

City Manager

Police Chief

City of Vancouver, WA

Assistant City Manager

City of Waldport, OR

City Manager

City of Walla Walla, WA

City Manager

City of West Linn, OR

City Manager

City of White Salmon, WA

City Administrator

City of Wood Village, OR

City Manager

City of Woodburn, OR

City Administrator

City of Woodinville, WA

City Manager

City of Woodland, WA

City Administrator

City of Yachats, OR

City Manager

City of Yakima, WA

City Manager

Assistant City Manager

City of Yelm, WA

City Administrator

Blaine County, ID

County Administrator

Clackamas County, OR

County Administrator

Clatsop County, OR

County Manager (2)

Curry County, OR

County Administrator

Deschutes County, OR

Fair & Expo Director

County Administrator

Eagle County, CO

County Manager

Franklin County, WA

County Administrator

Hood River County, OR

County Administrator

Island County, WA

County Administrator

Jefferson County, WA

Central Services Director

Lane County, OR

County Administrator

Lewis County, WA

County Manager

Mason County, WA

County Administrator

Mono County, CA

County Administrative Officer

Assistant County Administrative

Officer

San Juan County, WA

County Manager

Snohomish County, WA

Executive Director (2)

Thurston County, WA

Assistant Chief Administrative Officer

Town of Friday Harbor, WA

Town Administrator

WORK SAMPLES: POSITION PROFILE AND INVITATION TO APPLY LETTER

(Attached). Additional samples available at gmphr.com. Copyright © 2024 by GMP Consultants, . All rights reserved.

CITY ADMINISTRATOR

CITY OF OAK PARK HEIGHTS, MN



Why Apply?

This is a great opportunity to join a well-tenured and established City Council and staff team in continuing to build a community recognized for its excellent quality of life and amenities. The position is available due to the retirement of its long-term City Administrator who is leaving a solid department head team, a positive and trusted organizational culture, very positive financial conditions, and strong City Council/Staff relations. Given its suburban environment, the next City Administrator will have great opportunities for continuing to build on the strength of the organization and to further develop and strengthen collaborative relationships with other community and governmental entities.



Welcome to **OAK PARK HEIGHTS**

Oak Park Heights, Minnesota is a vibrant community nestled alongside the scenic St. Croix River in Washington County, just east of the bustling Twin Cities metropolitan area. Residents appreciate the charming small-town atmosphere, convenient amenities, abundant opportunities for outdoor recreation, and easy access to the big city offerings of nearby Minneapolis and St. Paul.

This city of 4,750 residents increases to a daytime population of 20,000 as Oak Park Heights is home to large commercial areas that includes major retailers such as Wal-Mart, Menards, and Lowes. Over 2,000 students attend the highly rated local Stillwater Area High School. The State of Minnesota Correctional Facility is located in Oak Park Heights and houses over 460 prisoners.

The City takes pride in the park and recreational facilities available for residents and visitors. There are over 100 acres of designated park space comprised of five municipal park facilities, including ice rinks and warming houses, softball and baseball fields, picnic shelters, tennis courts, and playgrounds. For the past 36 years, the City has been awarded the "Tree City USA" award for its local commitment to community trees and forests.

Winding alongside the city is the St. Croix River—the state border between Minnesota and Wisconsin—and one of only eight waterways originally designated as a "National Wild and Scenic River" by the federal government in 1968. Widely considered one of the best canoeing rivers in the nation, the St. Croix offers ample opportunities for boating, kayaking, fishing, or enjoying a scenic paddleboat ride.

Oak Park Heights boasts a strong sense of community. The City hosts an annual "Party in the Park" that provides an opportunity for residents to get to know Councilmembers, City Staff, and local businesses. Councilmembers serve hot dogs and snow cones while community members enjoy bouncy houses, face painting, music, games, and prizes. In addition to this event, now in its 27th year, the City has hosted a popular Summer Park Program for over 15 years.





THE CITY OF OAK PARK HEIGHTS

The City of Oak Park Heights was incorporated as a village in 1938 and became a City by State Statute in 1972. The City operates under a “Plan A, Council-Administrator” form of government, consisting of a Mayor and a four-member Council. The Mayor and Council are elected at large on a non-partisan basis for four-year terms.

The Council is responsible for adopting policies affecting City affairs, approving the annual budget, enacting ordinances and resolutions, and providing policy direction for City departments and activities. The City Council currently serves as the Economic Development Authority. The City has a Planning Commission and a Parks Commission.

The City serves a population of 4,750 with a 2023 total General Fund budget of \$6.8 million and a team of 22 FTEs. Departments include Administration, Police, Finance, and Public Works. The community is financially strong with an AA2 Bond rating and is two years away from being debt free. It has a very stable staff history and a combination of municipal and privately contracted public services.



THE CITY ADMINISTRATOR

Reporting to the City Council, the City Administrator performs top-level supervisory, administrative, and professional work to plan and direct the administration of City functions as established by the City Council to ensure efficient municipal services and development in line with the Council goals and objectives. This requires coordinating activities and functions, creating proper procedures and processes for exchanging information and reaching decisions, and flexibility in reacting to the needs and desires of others.

The City Administrator supervises the management and coordination of all departments and consultants including Administration, Police, Public Works, Finance, Legal, Fire Protection, and Planning and Engineering consultants. Direct reports are the Assistant City Administrator/Clerk, Finance Director, Police Chief, Public Works Director, Building Official, and Administrative Assistant. This position is also responsible for overseeing community development-related duties.

**FULL-TIME
EMPLOYEES**
22

2023 BUDGET
\$6.8 million

AREA
3.4 square
miles

POPULATION
4,750

BOND RATING
AA2



THE IDEAL CANDIDATE

View job
description
[here](#)

- Demonstrated leadership skills.
- Integrity and honesty beyond reproach.
- A confident and self-assured demeanor that will engender trust with Council and staff.
- A good communicator who is responsive to councilmembers, the community, and the city staff; and who actively listens and follows up to resolve issues.
- Balances the responsibilities of managing day to day operations with representing the City's interests through engagement with external community, state, and national associations and organizations.
- A collaborative and proactive management style when addressing community and organizational issues and needs.
- Values and supports the overall needs of staff and the organization.
- A communication style and approach that demonstrates strong listening skills and an appreciation and respect for opposing viewpoints.
- Ensures regular communication throughout the organization in a way that keeps the Council and staff informed.
- Fiscally responsible with an understanding of financial management needs.
- Navigates the needs and dynamics of the City Council with a uniform approach, a positive attitude, and as a resource.
- Solutions-oriented and will respond to issues and inquiries in a positive way.
- Strong facilitation skills that support and enable opportunities to reach consensus, especially on difficult issues.
- Strong knowledge and experience with planning and zoning issues.



EDUCATION & EXPERIENCE

- Bachelor's degree in public administration or closely related field. (Master's preferred).
- Five years of experience in broad areas of managing public organizations that contributed to a knowledge base and an ability to employ management, budgeting, planning and program techniques in daily operation of a similarly complex entity.
- Ability to communicate effectively, orally and in written form.
- Ability to develop and maintain positive and effective working relationships with the city council, city commissions, city personnel, and the general public.

Or any equivalent combination of education and experience that provides the applicant with the knowledge, skills, and abilities to perform the job.

OPPORTUNITIES & CHALLENGES

- The Xcel Energy – Allen S. King Coal-Fired Power Plant is scheduled to close in 2028, which will significantly impact the community's tax revenues. This closure will require proactive planning with multiple jurisdictions to transition the 170-acre site into a new type of land use that meets community expectations.
- An implementation plan is needed for the use of \$2.1 million in state bonding intended for extending city-owned water and sewer utilities to the Xcel Energy – Allen S. King Coal-Fired Power Plant site.
- The City is intending to construct a third municipal well in 2025. This project will include the need for filtration of PFAS.
- Washington County is leading a project related to the extension of 58th Street. This project requires an awareness of the long-term financial and development impacts for the community and strong leadership in guiding the negotiations.
- The City currently has a 10-year Joint Volunteer Fire Service agreement with the City of Bayport. There is an ongoing effort to reevaluate the contractual relationship and possible need for paid firefighters.
- The Finance Director will be retiring in the near future and will require a recruitment effort that reflects future departmental needs.
- The City Administrator will have the opportunity to consider the long-term staffing needs of the organization that will ensure its continued stability into the future.
- There is a desire to build stronger and more positive relationships with Washington County and adjacent communities in finding ways to collaborate around areas of common interest.



COMPENSATION & BENEFITS

The City of Oak Park Heights is offering an annual salary range of \$135,000 to \$155,000 for this position, dependent upon experience and qualifications, along with a comprehensive benefits package.

RESOURCES

[City of Oak Park Heights](#)

[2023 City Budget](#)

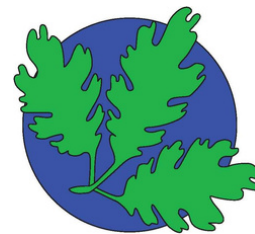
[City Planning and Zoning Docs](#)

[2018 City Comprehensive Plan](#)

[Metropolitan Council – Community Data](#)

[Greater Stillwater Area Chamber of Commerce](#)

[Stillwater/Oak Park Heights Convention & Visitors Bureau \(CVB\)](#)



TO APPLY

Apply Online: gmphr.com

First Review: **August 7, 2023**

More Info: Matt Fulton, GMP Consultants
mfulton@gmphr.com / (651) 242-2422



BRAINERD CITY ADMINISTRATOR



Dear Colleague,

GMP Consultants is assisting the **City of Brainerd**, MN in finding a **City Administrator**. Perhaps this is the right time in your career to consider this exciting opportunity. If not, would you please pass this on to others who may be interested?

Thank you for your consideration and assistance.

Greg M. Prothman, GMP Consultants
greg@gmphr.com / 206-714-9499



WHY APPLY?

A city for all seasons, Brainerd, Minnesota offers an opportunity for an entrepreneurial and innovative city administrator to lead a team of exceptional and talented staff in one of Minnesota's most desirable outdoor recreational and tourism meccas.

Working with an established and forward-thinking City Council, the City Administrator will lead an exceptional organization in this full-service city known for an exceptional quality of life with diverse amenities in the heart of northern Minnesota's lake country.

The City has a strong and stable financial condition with a diverse economy and an ambitious vision for the future. The next City Administrator will have the opportunity to build upon previous strengths and succeed through collaborative partnerships to take this community to the next level.

THE IDEAL CANDIDATE

- Has strong leadership abilities and effective communication skills.
- Lives by the values of honesty, integrity, professionalism, transparency, accountability, and ethical behavior.
- Utilizes staff to research assignments to make sound recommendations and implement Council's decisions to completion. Accepts direction and assignments from Council.
- A visionary leader that can anticipate situations and react accordingly; helps Council and staff identify, define, and shape a vision for improvements.
- Keeps Council thoroughly informed on critical issues, programs, and activities.
- Makes decisions that are thoughtful, pragmatic, thorough, decisive, and defensible.
- Effectively delegates responsibility to staff without micromanaging. Supports staff needing assistance and encourages staff to take charge of, and responsibility for, their work while ensuring accountability.
- Supervises staff in teamwork/collaborative fashion emphasizing high performance government to ensure service delivery is effective, efficient, and professional. Challenges staff to be entrepreneurial, innovative, and creative. Leads by example, trusts staff and supports them in the face of criticism.
- Focuses on organizational performance and achieving results by effectively navigating the organization. Promotes community-based partnerships to achieve results.
- Helps the council by facilitating information management and policy development to resolve issues through comprehensive, pragmatic, and data-driven recommendations.



THE CITY OF BRAINERD

Located roughly 60 miles north of St. Cloud and 120 miles north of the Twin Cities, Brainerd is a vibrant community nestled in the heart of Minnesota's lake country. With 14,679 residents, Brainerd is one of the largest cities in Crow Wing County and serves as the county seat and regional hub.

Incorporated in 1881, the City of Brainerd is governed by a Mayor and a seven-member City Council elected to four-year terms. The City's 2022 Operating Revenue for all funds was \$53.1 million. Staffing includes a team of 125 FTEs and 40 paid on-call positions for the Fire Department. The City has seven collective bargaining units and an S&P credit rating of AA-.

Departments include Finance, Public Works, Human Resources, IT/GIS, Community Development, Fire, Police, and Public Utilities. Advisory boards and commissions include Public Utilities, Planning, Airport, Parks, Transit, Economic Development Authority, and Housing & Redevelopment. The City enjoys a strong partnership with the Brainerd Lakes Economic Development Corporation to aggressively promote and develop all aspects of economic development.

COMPENSATION

The City of Brainerd is offering an annual hiring salary range of \$120,120 to \$138,132 for 2023 depending upon experience and qualifications. The full salary range is \$120,120 to \$150,155. The City also offers a Performance based pay opportunity up to \$162,157 based on merit.

LEARN MORE

Visit: gmphr.com

First Review Date: **December 31, 2023**

More Information: Jeff Weldon, GMP Consultants
jweldon@gmphr.com / (320) 557-8006



May 07,2024



**City of North Branch
Response to Request for Proposals
Executive Search Firm City Administrator Recruitment**

Savio Pais
President
(848)248-5231
info@netsynkinc.com

Netsynk Inc.
1895 Apple Valley Road,
Bolingbrook, Illinois, 60490

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MISSION AND VISION



MISSION

Serve our clients, employees, partners and community by doing it right.



VISION

Be the sought after staffing services company for our clients and consultants

VALUES



100%

Responsiveness: Responding quickly to our clients, consultants and partners is the fundamental in our culture

100%

Passionate: We are passionate about serving our clients and consultants

100%

Discipline: We are truly disciplined daily to work our goals

At Netsynk, we work hard to create a healthy environment for our employees to work their best. We understand clearly that our clients have choices and our consultants look up to us to help them achieve their dream job. This is important and hence we take it very seriously.

EXPERIENCE

Netsynk has almost five years of experience working with top Fortune 1000 clients; supporting their needs. The founders of Netsynk have over 20+ years of experience working with leading staffing companies and supporting clients with high volume and demand. With strength of over 10+ talent professionals with almost five years of experience in sourcing and recruitment; Netsynk has experience successfully staffing resources as a sub-contractor for an implementation partner, on a government project, specifically on executive search services.

QUALIFICATIONS OF KEY PERSONNEL

1. Savio Pais (President)

Over 20 years of experience working in the Information Technology industry selling to clients currently in the Services space in North America and providing services to our clients within Solutions, Consulting and Professional Services areas. Excellent knowledge of Sales & Marketing. I have worked with clients specifically within the Technology area. Been always a road warrior, travelling widely all over North America. My experience has been in Market Research. I have an in-depth understanding of Advertising and Market Research.

WORK EXPERIENCE

- Netsynk Inc. | President- July 2019-present
- Enterprise Solution Inc. | Vice President- July 2015-Oct 2018
- Collabera | Supporting Technology- Feb 2005-June 2015
- Majesco | Manger- 2004-2005
- IBBSC | Manger- 2002-2003
- Pase Associate | Markert Researcher- 1998-1999
- Kantar | Executive Market Researcher- 1995- 1999

EDUCATION

Master of Business Administrative (MBA)- University of Oklahoma

SKILL

- Data Analysis
- PMO
- SDLC
- Data Warehousing
- Vendor Management
- IT Strategy
- Business Analysis
- System Analysis

2. CHANDNI SINGH (TEAM LEAD)

As a seasoned senior recruiter, my professional expertise lies in identifying and securing exceptional talent for a variety of roles within organizations. I am adept at sourcing and screening candidates and managing the end-to-end recruitment process with a keen focus on providing positive candidate experience. In addition, I have a proven track record of developing and implementing successful recruitment strategies that attract and retain top-tier candidates. My ability to build strong relationships with both candidates and hiring managers has been key in ensuring successful placements and a satisfied workforce.

WORK EXPERIENCE

- Team Lead | Netsynk Inc. June 2023 – present
- Senior Recruiter | Netsynk Inc. Jan 2023 – May 2023
- Associate Recruiter | Netsynk Inc. J a n 2 0 2 2 -Dec 2 0 2 3
- Magnatek Enterprise Dec 2020 – Jan 2021

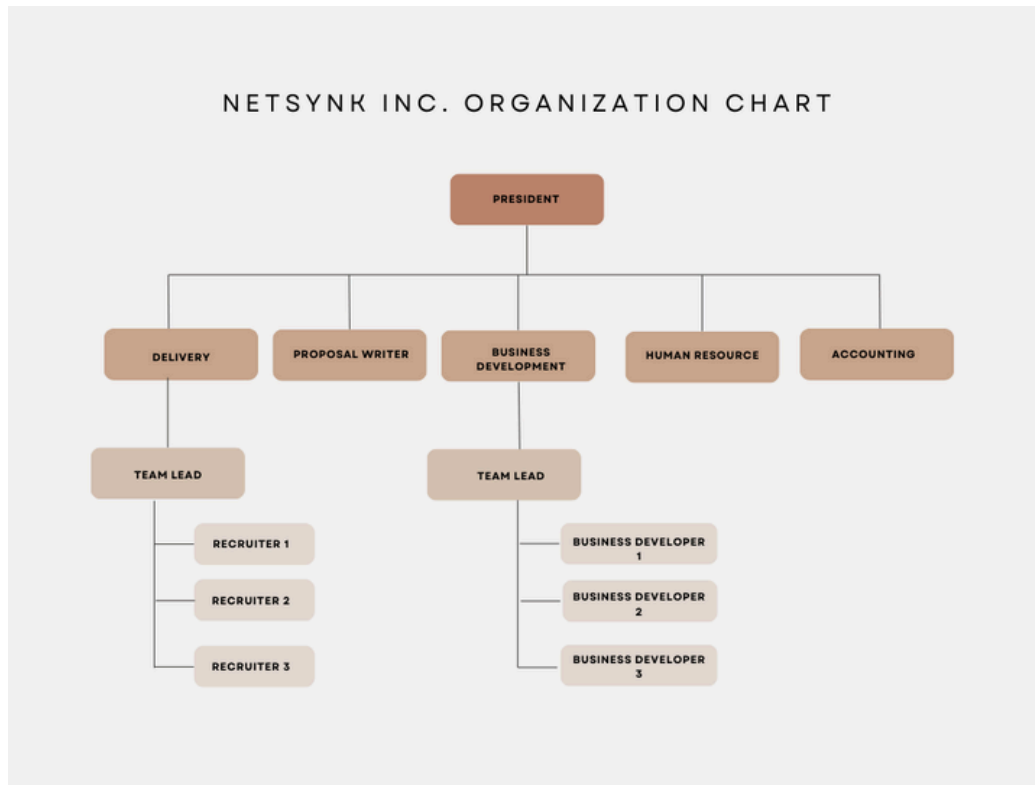
EDUCATION

2017 - 2021 Bachelors of Pharmacy at Lovely Professional University

SKILLS

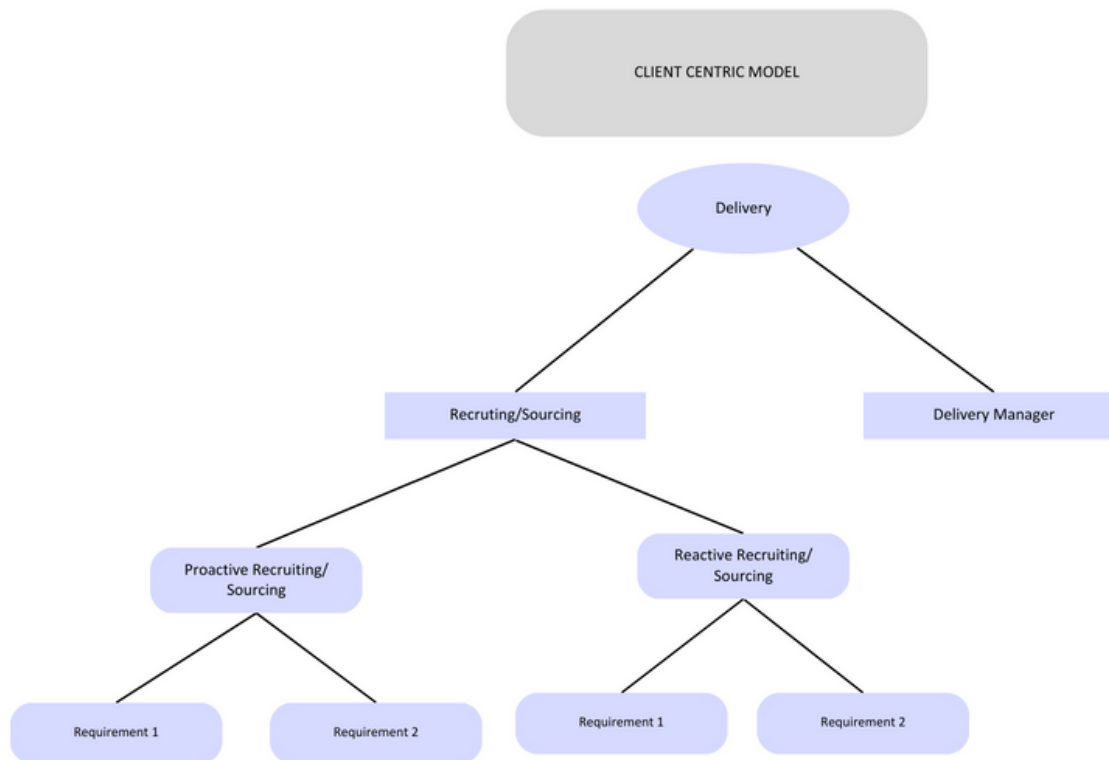
- Communication skills
- Relationship-building skills
- Time management and organization skills
- Problem-solving and critical thinking skills
- Technical skills
- Sales skills
- Attention to detail

ORGANIZATIONAL STRUCTURE



STATEMENT OF PROPOSED WORK

METHODOLOGY



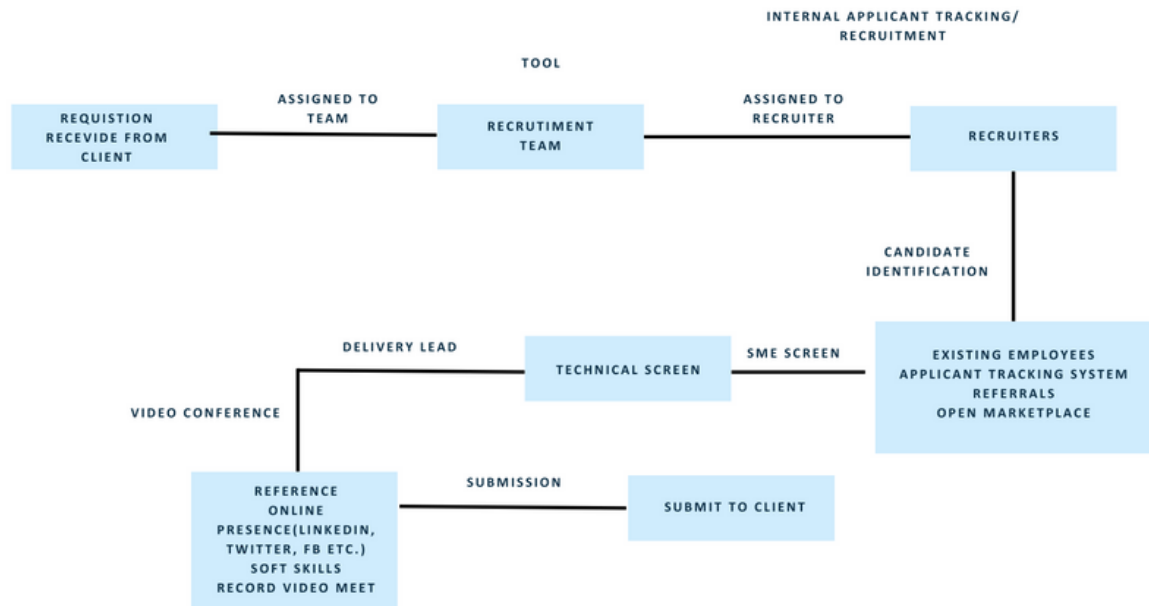
There are 2 ways in which we procure candidates for our clients, viz. proactive and reactive.

a. Proactive Recruitment: A proactive team is responsible for sourcing candidates for the future. In other words, these requirements are not published or released to any vendor by the client. However, Netsynk will identify candidates for the future, by reaching out to potential candidates to check their skills and availability. In our opinion, this investment would help create a pool of resources, identified for the future.

b. Reactive Recruitment: This recruitment would be conducted in a reactive manner, which in other words implies only when a requirement is published or released to vendors will Netsynk work on those requirements.

Recruiter profile: The average recruiter at Netsynk employment is almost five years. All recruiters are trained to conduct sourcing and recruitment by following the best recruitment practices.

Recruitment team: Recruitment team has access to a database of 1 million candidates available on our Applicant Tracking System (ATS). Netsynk subscribes to premium job portals like Monster, CareerBuilder, and Dice etc. Attendance at networking events and job fairs is another important part of our recruitment process. At any point in time, Netsynk maintains a list of qualified candidates for each position to fill the vacancies which are created either by the termination or resignation of candidates. All these candidates are housed in our ATS.



When the requirement is released or published by the client, Netsynk’s recruitment team starts work on the same. A requirement is released to a recruiter working dedicatedly on the client account. The delivery lead briefs the recruiter on how to source and recruit potential candidates for this requirement. The SME/ Delivery Lead prepare a skill evaluation matrix (Refer to Table 1) for the recruiter. The recruiter screens a potential candidate and rates the candidate on each of the primary and secondary skills; along with the number of years the candidate has worked with each of those skills. The recruiter conducts a screen to determine if the candidate has the skills and is a fit for the open requirement. Once the candidate clears the screen by the recruiter, the candidate is submitted to the Subject Matter Expert/the Delivery Lead, who conducts another round of screening with the potential candidate. The SME/delivery lead records his ratings in the same skill evaluation matrix (Refer to Table 1). The ratings of the recruiter and the SME/ Delivery Lead should match, or the candidate does not clear the screen conducted by the Delivery Lead. This two-tier skill evaluation check helps in providing quality candidates to our clients. All candidates are screened by the Delivery Lead via Microsoft Teams video conferencing. Camera interviews help us to identify the candidate, check his soft skills apart from his technical skills. Two relevant and recent supervisory references are verified. Additionally, the candidate is also checked on their online presence, viz, LinkedIn and Twitter. This process ensures that we submit genuine and quality candidates to our clients. Only after the candidate clears the screen or the interview with SME or Delivery Lead will the candidate be submitted to the client. The client has the right to review resumes and/or applications for employment and/or interview candidates and verify that the prospective candidate’s worker can provide the required services.

Table 1: Skill Evaluation Matrix

Requirement Name	Client's Mandatory Experience	Client's Overall Ratings (1-10)	Recruiter's Experience	Recruiter's Overall Ratings (1-10)	Team leads Experience Ratings	Team leads overall ratings	Remark's
Candidate identified from							
Name (Match with LinkedIn& resume)							
LinkedIn Profile							
LinkedIn Profile link							
Online presence check (LinkedIn/twitter/FB) Connected with candidate on LinkedIn (Y/N)							
(Full Name Check on LinkedIn (Y/N)							

Profile Picture Check on LinkedIn Does the candidate have icon of client he has worked with on LinkedIn (Y/ N)							
1) LinkedIn Profile picture							
2) Recommendation							
3) Connection							
SENIOR – TOTAL EXPERIENCE							
PRIMARY SKILL							
ID (Picture tallies with LinkedIn)							
Language (other than English)							
Work Authorization							

CHECK FOR THE FOLLOWING:

- LINKEDIN PROFILE IS MANDATORY
- AT LEAST TWO OF THE THREE CONDITIONS OF LINKEDIN MUST BE MET.
- PRIMARY SKILLS MUST BE MET.
- LINKEDIN PROFILE PICTURE AND DL SHOULD MATCH.
- IF ID CARD PICTURE DOESN'T MATCH WITH THE PICTURE ON THE LINKEDIN THAT IS A CONCERN
- WORK AUTHORIZATION

Netsynk believes in transparency and in giving honest updates of their progress at work, therefore the client can ask for any of these reports for their progress track of the contract.

Netsynk has a policy of requesting every candidate to sign the Non-disclosure Agreement and confirming their rates either by meeting them in the physical office or through video conferencing. This is done prior to the submission of candidate's profile.

Governing mechanism to avoid fabricated resumes:

Netsynk has a mechanism in place to avoid false candidates. This is done by following:

1. Professional references: Two supervisory references for the last three projects are checked before submission. The dates of employment, quality of work and would the past employee hire the candidate again if an opportunity arises, are some of the questions asked to these references. Based on the feedback provided, a candidate is submitted to the client.
2. Online presence check: Resumes are verified by checking them on LinkedIn.
3. Education check: All degree certificates are requested for checks which helps us determine when the candidate has graduated.
4. Valid government ID: All candidates need to submit a valid government ID (driver's licence, state ID, passport) before being interviewed by our SME/Delivery Lead. This ensures that the person interviewing with us is the same person being submitted to the client.
5. Video Screens: We conduct video screens of all candidates. The two-tier check ensures high level quality and genuine candidates. A client can always request for any video screen conducted by us and we can share the same.
6. Work Authorization: Before submitting a candidate to the client, Netsynk checks with the candidate if he/she is authorized to work in United States. Submission to the client:

A potential candidate, who has cleared Netsynk's screening, is submitted to the client via electronic mail or the client's portal. The following details are submitted:

The full name of the candidate (First, middle initials and last name i.e., mentioned on their SSN)

Availability to start on the project (Date and time)

Availability to interview (Date and time)

Current location (City and state)

Bill Rate (hourly rate)

LinkedIn profile link (if any)

Highlights of the candidate (reasons why the candidate is a fit for a requirement)

The submission email would also have skill evaluation matrix (Table 1) attached to it.

Netsynk strongly believes that the client needs to be kept abreast of the various steps during the recruiting cycle (via sourcing, recruiting, submission to the client, interview, and hire, start, and performance review and project completion). Hence, the candidate's submission email would encompass of the following:

Recruitment steps (Refer to Table 2) would indicate where Netsynk has reached for that step along with the person assigned to complete that step, either a Delivery Lead or recruiter.

TABLE 2

	Recruitment steps	Assigned to	1. What is the frequency of completing the recruitment step? 2. Has this step been completed? (Y/N)
	Sourcing		
I	Brief to Recruiter	DL	
	Create Skill Evaluation Template	DL	
	Identification of Potential Candidates	R	

II	Recruiting	R	
	Recruiter screens candidate	R	
	Screen conducted via Telephone/ video.	R	
	Checks conducted (employment)	R	
	Checks conducted (education)	R	
	Online presence check (LinkedIn/twitter/FB)	R	
	Checks Conducted (work authorization)	R	
	Fills Skill Evaluation Template	R	
	SME or DL screens candidate	DL	
	Fills skill Evaluation Template	DL	
	Screening conducted via Teams.	DL	
	Checks conducted (employment)	DL	
	Checks conducted (education)	DL	
	Checks Conducted (work authorization)	DL	
	If W2 (Rate confirmation/ RTR /NDA) signed	R/DL	

	If vendor company Rate confirmation with employer	R/DL	
	Pre-submission to the client	DL	
	Double-check all documents.	DL	
III	Submission to the client	DL	
	Highlights/ why the candidate is a strong fit.	DL	
	Follow-up with the client on submission	DL	
IV	Interview	DL	
	Pre-interview	DL/ R	
	Interview availability confirmation with the candidate	DL	
	Interview schedule with client and candidate	DL/ R	
	The candidate confirmed the interview. availability	DL/ R	
	DL attendance at the interview to confirmed candidate.	DL	
	Collect Feedback on interview.	DL	

V	Hire	DL	
	Client confirmation via email	DL	
	We confirmed the availability of the candidate	DL	
	Initiated Background check	DL	
	Share Background check every week.	DL	
	Collect MSA, I9, Work order, Cocoa, etc.	DL	
	Collect start date from the client.	DL	
	Client (Laptop. Login credential) collects and share with the candidate.	DL	
	Shared reporting details with the candidate Manager name phone number email start date and time	DL	
	On boarding brief with the candidate (Manger details, atria, client expectation project, Manger's timesheet)	DL	
	Shared start details with the candidate Manager name phone number email start date and time	DL	

VI	Start		
	On the first day of start confirm the candidate started and inform client.	DL	
	informed HR, Timesheet, AP	DL	
	Speak with candidate weekly basis	DL	
VII	Performance review/ customer review Once in three weeks	DL	
	Share feedback with the candidate.	DL	
VII	Project completion/ Post completion	DL	
	Inform candidate of end date	DL	
	Collect laptop return schedule.	DL	
	Check with client receive laptop any other property.	DL	

R= RECRUITER

DL= DELIVERY LEAD

BACKGROUND POLICY CHECK PROCESS

Prior to engaging in work for the client, Netsynk's employees, regardless of referral status, shall be required to submit to and successfully complete a full state and federal criminal background investigation. The background investigation shall be coordinated by and be conducted by and at the expense of Netsynk. Netsynk will not place an employee to work with the client who has any prior criminal convictions. Netsynk will not refer any applicant that has not cleared the background checks.

Netsynk's HR team are provided training on the background check provided by client and guidelines to follow the same as per the agreement. The HR team meets with the compliance team twice a week to discuss the background check process or any issues met by the background check team.

Netsynk is sensitive to information that is shared by the candidate and hence, maintains the highest level of confidentiality. Only HR team, operation team and senior management have access to this confidential information.

On acceptance of offer, our on boarding team will provide the candidate background check release package. The following checks are conducted viz, social security, criminal (i.e., federal and county level for 7 years), and government watch list. Education checks are conducted to ascertain to highest level attained by the candidate. The employment check for the last 7 years is conducted. A 10-panel drug test is also conducted.

Budget and Deliverables

Netsynk Inc., charges 20% base salary of the potential candidate selected.

Proposed Timeline





EXECUTIVE SEARCH SERVICES

CITY OF NORTH BRANCH, MINNESOTA

Proposal By:

Mike Humpal, CEcD



www.mnscsc.org

Proposal For:

Human Resources



www.ci.north-branch.mn.us

South Central Service Cooperative (SCSC) appreciates the opportunity to present this proposal to the City of North Branch for Executive Search Services. SCSC's highly skilled staff has many years of collective experience in all aspects of local government.

GENERAL BACKGROUND

Since 1976, South Central Service Cooperative has been facilitating programs and services between local governments and school districts across south central Minnesota. We work with these entities in the nine-county region on projects or contracted services that help promote cooperation by pooling human and financial resources. We believe services are most efficient and cost effective when implemented at a regional level rather than a "one size fits all approach," which may occur when mandates are managed at the state and federal levels. Facilitating services regionally creates economies of scale and maintains a consistency in the process that positively affects local governments and school districts.

EXPERIENCED LEADERSHIP

Mike Humpal, CEcD, Manager of Local Government Solutions, will serve as team leader for the City of North Branch. Humpal has a bachelor's degree and master's degree in public administration, along with being a certified Economic Developer. Humpal has more than 30 years of local government experience, including 18 years as an Assistant City Administrator and City Administrator responsible for hiring senior management for the City of Fairmont. Humpal is assisted by SCSC team members: **Wendell Sande**, Director, Insurance Services Director, Advisory Services; **Hannah Keltgen**, Manager of Wellness and Marketing Communications; **Roberta Jensen**, Marketing Communications Specialist, **Crista Krosch**, Marketing Communications Support; **Jessica Maday**, Administrative Services Coordinator; and **Crystal Hanson**, Practitioner & Founder South Creek HR.

PROJECT SCOPE

- Meet with North Branch city staff and council to provide an overview of the search process.
- Meet with the mayor, city council, and staff to create a position profile, job description, and a set of goals for the City Administrator.
- Create a search calendar and timeline.
- Recruit candidates for the position.
- Facilitate both preliminary and final candidate screenings, and make recommendations for interview selections.
- Assist the city council with the interview process.
- Meet with city council to facilitate the decision on the new City Administrator and develop an Employment Agreement for the position as needed.
- Provide mentoring to the new City Administrator.

SERVICES

- SCSC will provide the city council with an overall strategy and recruitment process for the City Administrator.
- SCSC will develop a job announcement, position profile, and advertisement for the position with professional organizations whose focus is local government. SCSC staff will also reach out to individuals within the field to make them aware of the open position and search process.
- SCSC will promote the open position on select job placement sites (e.g., Association of Minnesota Counties, League of Minnesota Cities, Iowa and Wisconsin League of Cities, International City Managers Association, and National Association of Counties Recruitment Resources) and through social media (e.g., Facebook & LinkedIn).
- SCSC staff will complete a review of the applications, provide a leadership management assessment and PXT assessment, and complete reference checks and criminal background histories.
- SCSC will provide the city council with weekly updates on the status of the process and a general summary of each applicant's experience and background.
- SCSC will provide the city council a preliminary list of the top 10 applicants.
- SCSC will provide five candidates to the city council with the goal of interviewing the top four candidates. The fifth candidate will be an alternate in case one drops out. Each member of the council will receive a profile folder with all the pertinent information about the top four candidates to review in advance of the interviews.
- SCSC will arrange and attend a public meet and greet of the candidates allowing the city council, staff, and community members the opportunity to meet the candidates before the interview process begins.
- At the direction of the city council and in cooperation with the North Branch City Attorney, SCSC staff will present an employment agreement and negotiate with the chosen candidate.

PROPOSED TIME AND COST ALLOCATION

South Central Service Cooperative proposes to complete this executive search as outlined not to exceed \$15,500.00*. This fee includes:

Executive Search Time / Cost Allocation:

- Conduct the initial meeting with city council search committee
- Create an application packet and announcement documents
- Review and rank applications
- Provide search committee a short list of applicants
- Contact references for top five candidates
- Call or hold virtual meetings with top five candidates to perform management/leadership assessments
- Prepare and summarize support documents and conduct background checks
- Organize and attend a community/candidates Meet and Greet event
- Participate in interview-related meetings with the city council
- Prepare an offer letter including bullet points for terms of employment agreement as directed by the city council
- Negotiate the employment agreement, including all discussions with the city attorney and candidate
- Administrative and Marketing Communications staff time
- Travel costs

\$11,500.00

Additional Cost Allocations

- Arrange for a leadership-management assessment and PXT assessment
- Staff time contingency
- Background checks
- Publication and advertising
- Printed materials for council binders

\$ 4,000.00

TOTAL (to be invoiced at conclusion of search)

\$15,500.00

*Two-year Timeframe: if another executive search is required within two years, SCSC will complete the search at no additional fee.

PREVIOUS SEARCHES/ REFERENCES

For a listing of completed searches, see pages 5 & 6. Please feel free to contact the following regarding their experience working with SCSC on their recent executive searches:

- Rob Mason, City Administrator (Retired), City of East Gull Lake, MN / 218-828-9279
- David Braun, Mayor, City of Wells, MN / 507-327-9840
- Dawn Kratzke, Mayor, City of Gaylord, MN / 507-237-2338
- Daryl Glassmaker, Mayor, City of Byron, MN / 507-273-1680
- Joe Martin, County Administrator, Le Sueur County, MN / 507-357-8220

I look forward to speaking with you regarding the Executive Search for the City of North Branch. Please do not hesitate to contact me with questions or clarifications.

Respectfully,



Mike Humpal, CEcD
Manager, Local Government Solutions
South Central Service Cooperative

2075 Lookout Drive
North Mankato, MN 56003
Mobile: 507-236-7651
mhumpal@mnsccsc.org

RECENT SEARCHES



City of Oronoco, Minnesota



The City of Blooming Prairie, Mn



(Multiple)

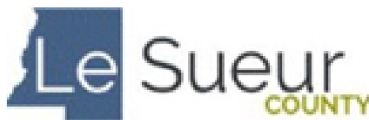
BYRON Minnesota
Where Neighbors Become Family. Welcome Home.



Hector, Minnesota



(Multiple)



City of Mountain Lake



(Public Works)



(Multiple)



(Multiple)



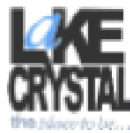
(Multiple)



INTERIM ADMINISTRATOR/ MANAGEMENT PLACEMENTS



City of Madison Lake
(Multiple)



City of
Mountain Lake 

MEET OUR TEAM



Mike Humpal
Manager

Manager of Local Government Solutions at South Central Service Cooperative. Mike Humpal holds a bachelor's degree in public administration from Northern Arizona University, and a master's degree in public administration from the University of Nebraska, and also received his Certified Economic Developer (CEcD). Humpal has more than 30 years of local government experience and served as a Community Economic Development Specialist for the Omaha Metropolitan Area Planning Agency. In addition, he served as City Administrator/Community Development Director for the City of Fairmont.

Founder and HR Practitioner of South Creek HR, a consulting firm specializing in developing leaders and providing Human Resources expertise to small and mid-sized businesses of all industries. Crystal Hanson has over 18 years of experience and holds a master's degree in human resources and industrial relations from the Carlson School of Management at the University of Minnesota. While Hanson's HR background runs deep, her professional passions include coaching leaders, building cohesive teams, digging into the pulse of organizations, and helping managers solve their own unique leadership challenges.



Crystal Hanson
HR Practitioner

MEET OUR TEAM



Wendell Sande
Director

Advisory Services Director at the SCSC, Wendell Sande oversees the provision of services to local government within the SCSC service area. Sande has a bachelor's degree in accounting from Minnesota State University-Mankato. He has worked in public accounting, the private industry, and has 40 years of experience in local government finance, economic development, and administration. He currently serves on the board of Southeastern Minnesota 504 Development Incorporated. In addition, Sande has a Certificate of Achievement in Local Government Finance from the Government Finance Officer Association.

Manager of Wellness and Marketing Communication, Hannah Keltgen has a bachelor's degree from Mankato State University, Mankato with over eight years of Human Resources experience working in the private sector and public-school systems. She is recognized as a results-oriented leader who strategically leverages her skills to drive motivation, retention, and talent acquisition initiatives. Keltgen is committed to empowering organizations to maximize the potential of their most valuable asset – their people. She is dedicated to helping individuals realize their full potential, encouraging them to bring their authentic selves to the workplace and contribute their best to the team.



Hannah Keltgen
Manager

DRAFT TIMELINE 5/13/24.

For the search for a new city administrator for North Branch, Minnesota

June 11 City finalizes search decision.

June 12 – 18-time frame Meet with search committee, staff, and city council.

June 17 – July 8 Develop strategy, expectations, job description position announcement brochure, and other advertising documents.

July 8-10 approval of job expectations and position announcement and advertising information. I can work with city staff to approve this information. Voting by the council is not required.

July 12 Advertise position for thirty days.

July/August Review application packets as they come in, rate application packets based on set criteria. The City Council receives updates every 7 to 10 days with a summary of the number of applicants and a general summary of each applicant's education and experience.

August 12 Advertising for the position concludes.

Final Application review

August 20 Provide a summary of the top 10 applicants scoring highest based upon resume experience etc.

August 26 September 13 SCSC Zoom meeting with top candidates, PXT, leadership management assessment, Reference checks background checks.

September 16 – 20 timeframe City Council review top 5 candidate summaries/Schedule Interviews

September? The City Council receives Candidate packets for review.

Week of September 30 or October 7th Interviews

Day 1 candidates meet/interview with city staff and other groups as requested. Public meet and greet with the candidates, 5:00pm–6:30pm

Day 2 City council interviews candidates/deliberate and decides on a new City Administrator.

Two to Three days after interviews Negotiate employment agreement.

City Council vote on employment agreement and appoint new city administrator Next city council meeting.

Mid to late November or when available New City Administrator start date.