



June 21, 2023

Abby Partin, HR Administrator
City of Brisbane
50 Park Place
Brisbane, CA 94005

Dear Ms. Partin:

Thank you for the opportunity to submit our recruitment proposal for the position of City Manager for the City of Brisbane. We feel well suited to fulfill your executive search requirements based on our track record of successful recruitments, our service approach, and overall recruitment expertise.

We take great pride in providing our clients exceptional service and excellent results. And we feel well suited to support your city on this search. During the past 24 months, we have completed City Manager assignments for the cities of Chico, Pleasanton, Sand City, Cupertino, Yreka, Tulare, Ross, Paso Robles, Sausalito, and Fowler. Overall, in the past five years our firm has completed 29 city manager assignments. These include the cities of Stockton, Simi Valley, Hawthorne, Whittier, Port Hueneme, Pinole, Anaheim, Fremont, Vallejo, Hermosa Beach, Martinez, Half Moon Bay, Visalia, Fullerton, Redding, South El Monte, Monte Sereno, Benicia, and Beaumont. We feel the contacts made from these assignments would be highly beneficial to this search and your overall recruitment needs.

Below is the location and phone numbers of the office which will coordinate this activity along with the contacts and authorized representatives of Avery Associates:

Bill Avery
16 Lyndon Ave., Suite 200
Los Gatos, CA 95030
(office) 408 399-4424
(cell) 408 472-7873
(email) bill@averyassoc.net

Paul Kimura, Principal
16 Lyndon Ave., Suite 200
Los Gatos, CA 95030
(office) 408 399-4424
(cell) 408 472-7936
(email) paulk@averyassoc.net

Our extensive database of executives in municipal and county government provides an excellent foundation for the outreach efforts we describe in our proposal. We've also had extensive interaction with City Councils, City Managers and Assistant City Managers based on our labor relations practice. All these contacts would be an excellent resource in support of this recruitment.

William Avery & Associates, Inc.
Consultants to Management

16 Lyndon Ave., Suite 200
Los Gatos, CA 95030
408.399.4424
Fax: 408.399.4423
www.averyassoc.net

Following review of our proposal, it is our hope that our overall portfolio of successful recruitments, our professionalism, and the positive results we have delivered for our clients will provide the basis for selection of our firm. This proposal of recruitment services contains the following information:

- Company Overview
- Firm Qualifications/Experience
- Recruitment Team
- Recruitment Approach/Methodology
- Timeline
- Consulting Fee
- Guarantees & Ethics
- Principal Profiles

Thank you for the opportunity to be considered for this recruitment. If you have any questions, please do not hesitate to call me at 408-399-4424

Sincerely,



William H. Avery

WHA:jmc



PROPOSAL FOR THE CITY OF BRISBANE RECRUITMENT FOR CITY MANAGER

William Avery & Associates, Inc. – Overview

William Avery & Associates, Inc. (Avery Associates) is a successful and service focused Management Consulting firm based in Los Gatos, California. Incorporated in 1982, the firm specializes in Executive Search, Labor Relations, and Human Resources/Management Consulting.

The firm currently includes two Principals and several key consultants. Bill Avery, the founder of Avery Associates, heads, and manages the firm. He oversees the Labor Relations practice and is heavily involved in the search business including leading key searches. Paul Kimura focuses on and manages the Executive Search and Recruitment practice. Key staff members include Bill Lopez and Kristi Ward, who support the search practice and the firm's administrative staff includes Tomi Ewing and Jackie Collins. Temporary staff as needed augments the team.

Mr. Avery, having served in the past as a City Manager, provides the firm with direct experience and knowledge of city administration. Mr. Kimura's expertise in executive, technical and business recruitment, which he gained during his nineteen years of high technology experience, provides the basis for many of the recruitment strategies and tactics utilized by the firm. (Their profiles are attached.) Collectively and combined, the firms Principals offer exceptional expertise in public sector recruitment and consulting.

Firm Qualifications/Experience – What Differentiates Avery Associates

Exceptional service delivery and a very high-quality work product provide excellent results for our clients. This begins with the initial client meetings, which lead to detailed timelines for deliverables followed by weekly recruitment status updates following initiation of the search. Our candidate outreach efforts are professionally and confidentially conducted. The evaluation materials we provide clients are routinely characterized as accurate, comprehensive and of very high quality. We believe more so than any other public sector recruitment firm. This is largely based on our interview system utilizing behavioral interview techniques, which we describe in our recruitment plan. This leads to a quality product with excellent end results for our clients.

The service element is based on two factors: The first is the collective service philosophy from all our organizational team members. They are each dedicated to providing service and support to clients. The second factor is based on the high level of engagement and participation from the firm Principals in every search assignment. This hands-on involvement includes client interface, identifying and developing the ideal candidate profile and position specification, development of the search strategy, candidate outreach, interviewing and assessment, completion of reference interviews, candidate presentation, final interview facilitation and when desired, negotiation of employment terms with the successful candidate.



Recruitment Team for the City of Brisbane

Bill Avery will serve as the Project Lead for this assignment and will be assisted by Bill Lopez and Kristi Ward. Mr. Avery will be personally involved in the initial client meetings, development of the ideal candidate profile and search strategy, interviewing and assessment of candidates, the presentation of candidates, attendance at final interviews and will be available throughout the search process to provide other related consulting services.

Recruitment Approach/Methodology

I. Position Profile and Organizational Assessment

The initial assessment phase is a critical component of the search process. Mr. Avery will individually meet with City Council members, and with other city staff (as deemed appropriate by the policy makers) to discuss the organizational needs and position requirements and to formalize the recruitment job announcement.

We understand that some communities are committed to engaging their residents in determining the ideal profile for the new City Manager. If this is a priority for the City, we can utilize various approaches in reaching out to the community in soliciting their insights/inputs regarding the ideal City Manager. The ideal approach towards reaching the greatest number of residents is through an online community survey linked through your city's website. Alternative options include A town hall meeting (in today's environment, this would be conducted via video conferencing); conducting a "targeted" outreach effort to key community members as identified by the City Council (i.e., Service club/Chamber of Commerce/Downtown Association leaders; educational executives; homeowners association leaders; executives of community-based organizations). Any or all of these community outreach efforts can be incorporated into our recruitment model. We will include the Council's preferred approach as part of our Scope of Services at no additional charge.

Our goals in securing the collective insights from our meetings are to:

- Understand the City priorities for this position.
- Develop a clear understanding and consensus on the expertise, experience, education, performance attributes and operational style of the ideal candidate.
- Discuss the goals, objectives, deliverables, and challenges related to this position.
- Gain insight of the various organizational dynamics and departmental issues that exist within the organization.
- Identify the compelling aspects to this opportunity.

The formal recruitment announcement that includes the ideal candidate profile would be developed from the above discussions and incorporated into the formal position



announcement. The candidate profile is also utilized in various other means as a marketing tool, for advertising copy, postings, and for other announcements.

II. Development of the Search Strategy

Our search strategy will be developed in conjunction with the organizational assessment. The final approach is based on your input and considerations during the assessment activity. We would incorporate the following elements into this search:

- Original research, which consists of identification and contact of current incumbents or other candidates who meet the profile but are not actively seeking other employment.
- Development of a targeted candidate list based on our extensive database of key executive contacts, referrals and recommendations from key sources, and other current and former City Management personnel who have extensive contacts and networks in this area. We also make extensive use of Linked-In Recruiter and email/phone contact in our proactive outreach efforts to solicit interest from potential candidates.
- Public information sources that include various membership listings such as the League of California Cities, ICMA and the various municipal organizations within the U.S.
- An extensive mailing campaign to current city managers and select assistant managers throughout the U.S.
- Print advertising in ICMA Newsletter, Jobs Available and any other print publications deemed appropriate by the City.
- Internet job postings on national public sector employment bulletin boards, City Management and Municipal association-based web sites, and our company website.

III. Candidate Assessment

Our assessment process involves several “tiers” of evaluation. All candidates responding to this position will initially be evaluated based on their resume and if appropriate, an extensive phone “screening” by a member of the project team. Candidates who pass the initial “qualifying” criteria are then scheduled for a formal interview with Mr. Avery. These extended personal interviews typically take one hour and a thorough discussion of their experience, accomplishments, management philosophy and interpersonal style takes place.

In interviewing candidates, we utilize a methodology based on “behavioral” interview techniques. Fundamentally, this approach explores a candidate’s past accomplishments and experiences that relate to the position being considered. The philosophy here is that the best indicator of future performance is to evaluate past behavior. This methodology allows the firm to “project” how a candidate would approach and address the key challenges in the new position.



Those individuals who best fit the position requirements will have a Candidate Assessment Report developed by the Principal who conducted the interview. Additionally, two initial reference interviews are performed on these candidates. The reference interviews provide our clients with additional insights on the candidate's "behavior" and style.

IV. Candidate Presentation

Upon completion of formal interviews, a selection of candidates for presentation is made. We feel our extensive qualification, interview, and reference interviewing process and the knowledge gained during our initial assessment period; enable our client to proceed with fewer rather than more finalists. However, we will not restrict or limit the number of candidates recommended as this decision is related to the overall strength and depth of the candidate pool.

The final candidates are presented in our extensive candidate presentation "book". Each finalist will have a file consisting of a candidate summary sheet, the submitted cover letter and resume, the Candidate Assessment Report (based on the "behavioral" interview), and two candidate reference interviews. This extensive profile on each recommended candidate continually generates positive feedback from our clients as it provides extensive detail beyond just a resume.

The Candidate book also identifies other candidates who were given secondary consideration, which provides the client insight on others who were interviewed. Candidate summary sheets are created for everyone who submitted a resume would also be included. This provides the client an insight to the level and nature of response for their position.

V. Selection Process

Once the final candidate interview group is identified, we will assist in the structuring of the interview process and coordinate the interview scheduling activity. Our firm will also provide candidates with guidance related to travel planning, hotel accommodations, as well as other interview planning issues. Our firm will also develop potential interview questions and be in attendance during final interviews to help facilitate the process and to lead an end of day debrief and evaluation process.

VI. Position Closure and Follow-Up

Based on the firm's experience in human resource management and executive search, we can assist our clients in formulating appropriate compensation and other employment arrangements. We will be available throughout our retention to assist in this process.

As a matter of policy, Avery Associates monitors the transition and progress of any executive we place with a client. Within the first three to six months following the hired individual



joining the City, we will speak with that individual to ensure the transition has effectively occurred. During the same period, we will also review the individual's status with your office.

Recruitment Timeline

Task	Scheduled Dates
<i>Search Initiation, Marketing & Advertising Development:</i> <ul style="list-style-type: none"> ▪ <i>Initial meetings with city manager and city staff to define the ideal candidate profile.</i> ▪ <i>Develop draft of recruitment brochure for approval by client</i> ▪ <i>Recruitment strategy finalized.</i> ▪ <i>Determination of advertising scope and placement deadlines</i> ▪ <i>Brochure designed and printed</i> 	<i>Weeks 1 - 4</i>
<i>Marketing, Advertisement and Outreach Period:</i> <ul style="list-style-type: none"> ▪ <i>Mailing of brochures</i> ▪ <i>Jobs Available</i> ▪ <i>ICMA newsletter and website</i> <i>Preliminary candidate screening</i>	<i>Weeks 4 - 10</i>
<i>Candidate Review - Screening and Finalists Selection</i>	<i>Weeks 9-12</i>
<i>Development and finalization of Interview process and interview questions</i>	<i>Weeks 13-14</i>
<i>Interviews with City</i>	<i>Week 15</i>
<i>Final interviews and reference checks</i>	<i>Week 16</i>
<i>Appointment Offer/Acceptance</i>	<i>Week >17</i>
<i>Report to Work Date</i>	<i>Week >17</i>

Consulting Fee

Based on the services described in our proposal, the professional services consulting fee for this recruitment will be \$19,400. We would provide our first consulting invoice in the amount of \$8,400 at the outset of the search. A second invoice of \$5,500 would be billed with the presentation of candidate recommendations and the final invoice of \$5,500 for the retainer will be submitted at the completion of the search. The consulting fee will be inclusive of all services defined within this proposal unless otherwise stated.

In addition to the Professional Services Fee, normal and direct out-of-pocket expenses associated with the search are charged back to the client. Expenses for this assignment would not exceed \$6,500 without the express consent of the City. These expenses include advertising, clerical time, supplies, printing, telephone, postage, background checks and consultant travel for client discussions, meetings, local and out-of-area candidate interviews. All expense items are reimbursed "at cost" and will be detailed and billed monthly.



Guarantees and Ethics

Whenever William Avery & Associates, Inc. is retained; we make several guarantees and commitments to a client. Due to our experience, knowledge, and success within the management-consulting field, we assure a client that we will only present candidates who meet a substantial majority of the ideal qualifications that you have outlined. We are also committed to continue our search efforts until a successful candidate is employed.

During our placement efforts, we openly share any relationships, previous experience, and knowledge for any candidate we present for consideration. Our commitment and responsibility are to our clients and their best interests.

It is also our practice to replace a candidate who may voluntarily resign during the first year of his/her employment. This same commitment applies if the client finds it necessary to terminate or to request the resignation of the selected individual in the first year for any reason. In either case, we invoice a client only for out-of-pocket expenses incurred in identifying a replacement.



Avery Profile

William Avery

William Avery founded his successful management consulting firm in 1981. He has directed William Avery & Associates in service as a Labor Relations and Executive Search consultancy, serving personally as a chief negotiator, trainer, and representative in grievance and disciplinary matters.

A specialist and widely recognized expert in employer-employee relations, he has served as a City Manager (Los Gatos) and Assistant City Manager. While City Manager, he was President of the Santa Clara County City Manager's Association and Chair of the County Employee Relations Service.

Bill has lectured at De Anza College, San Jose State University, and Stanford University, and regularly makes presentations for the League of California Cities, CALPELRA, and other public sector organizations.

Building on his personal track record of success, he expanded the firm's focus to include increased emphasis on public and private sector search. He added proven industry professionals with expertise in these areas. The result has been to create an exceptionally strong management consulting firm, now known as Avery Associates, with the expertise to provide the full range of services required for successful public or private sector executive search.

A key measure of the firm's success has been the many long-term relationships that he and his staff have established with clients.

Bill holds B.A. in Political Science and an MPA from San Jose State University, where he was graduated with highest honors.



Avery Profile

Paul Kimura

Paul Kimura brings a unique combination of recruitment and business experience to Avery clients.

Paul is involved in leading Avery's public sector professional searches. He has been both a corporate recruitment director and HR director for several high technology companies, ranging from Fortune 500 firms such as Novell and National Semiconductor to a Silicon Valley start-up. His proven recruitment and HR generalist skills help him bring forward the best available candidates and properly assess their skills and "fit" with client organizations.

Indeed, many of the recruitment strategies and tactics incorporated into the Avery search process are a direct result of Paul's extensive recruitment experience in the high technology industry.

Paul has been a successful HR consultant, guiding clients through all aspects of Human Resources functions — compensation & benefits, employee and management training, performance management, and termination issues.

He is skilled in areas such as strategic planning, executive coaching, separation negotiation, and organizational assessment and design. It's another service that Avery Associates can offer its clients because of the unique background of its principals — and Paul's extended skill set in Human Resources underscores the fact that Avery professionals "have been there" and understand your needs from a personal perspective.

Paul holds a B.S. degree in Business Administration from San Jose State University. He is active in professional HR organizations and in the community, where he has worked with a number of education, youth service, civic, business, and cultural organizations.

"Just as Avery looks to form long-lasting relationships with its clients, I believe in making the same commitments within my community."

