



# City of Lathrup Village, Michigan

*Proposal to provide executive recruitment services*

December 20, 2021





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December 20, 2021

Chief Scott McKee  
Police Chief – Acting City Manager  
27400 Southfield Road  
Lathrup Village, MI 48076

Email: [policechief@lathrupvillage.org](mailto:policechief@lathrupvillage.org)

Dear Chief McKee:

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

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

- **Customized profile development:** essential to our outreach, marketing & recruitment process
- **Proprietary management/leadership assessment reports**
- **Link to one-way semifinalists' video interview responses to position specific questions**
- **Proprietary online application and document management tool**

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

Very truly yours,

BAKER TILLY US, LLP

A handwritten signature in dark ink, appearing to read "E.G. Williams".

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# 1. General information

## Firm introduction

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

Within Baker Tilly, our executive recruitment team consists of ten recruitment consultants and project coordination staff available to meet your executive recruitment needs. Each consultant assigned to your recruitment has experience working with cities, counties, special districts, not-for-profit organizations and school districts, and the many different disciplines that comprise the Lathrup Village organization. Our consultants bring an experienced, participatory and energetic perspective to each engagement. As such, we reflect our unique approach and personal touch in our internal standard and commitment to outstanding service that meets or exceeds your expectations. Since 2016, our combined consultant team has conducted more than 400 executive searches.

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

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

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

## Project contact

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## 2. Understanding and approach

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

### Our understanding of Lathrup Village's needs

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

Baker Tilly public sector executive recruiters will work with your City or 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 an executive recruitment marketing, recruitment and outreach strategy that presents the City of Lathrup Village as a well-managed, progressive, forward thinking and transparent municipal organization that is committed to service efficiency, responsiveness and continuous improvement.

We recognize that there is significant competition for experienced local government managers, leaders and executives today. For this reason, we work with you to develop recruitment strategies that include an aggressive marketing, recruiting and candidate outreach campaign. As you know, a successful recruitment often depends upon the ability to reach successful executives who may not necessarily be in search of new employment opportunities or who may be waiting for the right opportunity. Thus, we use our existing resources, successful methods and approaches to inform and encourage qualified professionals to consider and apply for opportunities such as those you may have in your organization. We believe that these efforts are essential to ensuring that your City staff receives and is able to select from a large number of 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 staff with comprehensive details and information about each candidate we present; expanding beyond applications, cover letters and resumes to better understand, compare and contrast individual professional experience, leadership traits and the management style he or she would bring to your organization. Furthermore, we explore and attempt to understand their motivation for pursuing each career opportunity. We also are able to provide you with a fully customized interview process to include suggested questions, interview day scheduling and planning, as you deem necessary or appropriate. Additionally, the lead consultant is available to you, or your designee, before, during and after each interview session and can facilitate your deliberations and employment offer and negotiations with the individual you select as finalist.

### Proposed solution to meet Lathrup Village's needs

*Edward Williams, project team leader, will conduct your recruitment out of our Plano, Texas office. Our highly regarded executive recruitment process includes five major tasks:*

#### 1. Recruitment brochure development and advertising

- We schedule and meet with your City's elected officials, 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 the profile you approve, we develop a colorful, informative and appealing brochure, then embark on a national or regional targeted marketing, recruitment and outreach campaign to identify individuals who best match your desired profile.
- Additionally, we simultaneously launch a direct applicant outreach campaign targeting eligible prospects who we identify by building a detailed query into our searchable applicant database.
- Using our proprietary applicant tracking system, we communicate with all applicants about the process, established timelines and next steps in the process.

#### 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 Questionnaire and Candidate Questionnaire, while the project team conducts a comprehensive web and social media scan to elicit information that could be relevant to employment and continuation in our process.
- We also provide selected applicants with a link that will take them to our proprietary one-way video interview portal. There, the candidates complete a one-way video interview, answering questions designed to give us an additional perspective on each applicant's candidacy as it relates to your desired profile.
- Once we gather the responses from the items listed above, we prepare and provide you with an electronic (PDF) Semi-Finalists Report listing 10 to 15 applicants who best appear to meet your desired profile. This report includes a list of all applicants and copies of resumes, cover letters and Due Diligence Questionnaire responses.
- 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 us with additional information, including development needs, strengths, personality and behavior analysis. This tool provides us with information about each finalist, which we have found to be important to the selection process.

#### 4. Background report checks, reference checks, social media presence, academic verifications

- We secure authorization from each finalist to conduct a comprehensive background check and reports.
- We obtain a list of up to ten current or former supervisors, peers or direct reports from each finalist to contact as references.
- We provide you with a report summarizing all responses to our customized reference questionnaire.
- We verify academic credentials and professional certifications.
- We conduct an exhaustive review of social and electronic media sites and other publications, to identify any information that may be relevant to the hiring of each individual you interview.
- We provide a comprehensive reference check and report for each finalist.

#### 5. Final interview process

- Once you identify your finalists, we work with your designated staff to design, prepare and provide technical support to ensure a smooth, effective and efficient interview process, which may include the scheduling and support for virtual interviews. If requested, we work with the selected finalist and your designated staff to finalize an employment agreement.



### Recruitment solutions during the Covid-19 Pandemic

In response to the COVID-19 pandemic, the Baker Tilly executive recruitment team will work closely with the Lathrup Village designated point of contact to develop alternative methods to complete all aspects of our established search processes using existing technologies and ensuring the overall safety of all involved, which may require virtual or telephonic meetings or interviews. Notwithstanding, we will creatively collaborate with your organization to gather and provide you with critical information essential to your hiring decisions.

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

The project team leader for your recruitment have successfully organized and directed several successful virtual and on-site interview processes following the prescribed social distancing protocols and best practices. As such, Edward is able to provide corresponding

### The Baker Tilly executive recruitment process

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

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

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

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

#### Advertisements for the City Manager/Administrator position could be placed

International City/County Management Association
National Forum of Black Public Administrators
Local Government Hispanic Network
Careers in Government (careersingovernment.com)
Engaging Local Government Leaders (ELGL) website

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### Advertisements for the City Manager/Administrator position could be placed

LinkedIn

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

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

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

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

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

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

During this part of our process, the project team leader will work with the City staff or designee to reach consensus on the leadership traits and management style you desire your next City Manager/Administrator will bring to your organization. Additionally, we identify the qualifications, experience and education you desire and/or require. We then use our proven strategies to identify other key competencies and work values that many



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organizations would typically associate with individual success in similar positions nationwide.

To ensure the overall effectiveness and timeliness of our communications, we send an acknowledgement to each applicant and provide them with the estimated schedule for your recruitment. We maintain open and productive communications with all applicants throughout the recruitment process. This includes updates, progress and individual status in the search process at every step. We take pride in the many complimentary comments candidates provide regarding our high level and quality of communications. Furthermore, applicants frequently applaud the professional manner in which our team handles their inquiries and information during and after each recruitment.

Project milestone	Deliverables	Timeline
Execution of recruitment strategy and candidate outreach	<ul style="list-style-type: none"><li>– Online data collection and profile development</li><li>– Development of interactive, searchable applicant database for recruitment of your City Manager/Administrator</li><li>– Baker Tilly performs direct outreach to prospective candidates identified in the recruitment strategy</li><li>– Utilization of extensive applicant database to identify applications and review applicant pool for competencies/demographics</li></ul>	4-5 weeks

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

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

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

Project milestone	Deliverables	Timeline
Applicant screening and recommendation of semi-finalists	<ul style="list-style-type: none"><li>– Baker Tilly compares applications to the approved candidate profile, developed in our searchable applicant database</li><li>– Most promising applicants are asked to complete candidate questionnaires and provide due diligence information</li><li>– Media, internet and social media scan for information pertinent to future employment</li><li>– Top candidates identified as semi-finalists</li></ul>	2-3 weeks

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	<ul style="list-style-type: none"> <li>– Semi-Finalist Report is prepared, including the brochure, master applicant list, cover letter and resume of candidates to be considered</li> <li>– Baker Tilly and the City review and rate video interviews</li> <li>– Baker Tilly sends links to City to review the aggregate responses and ratings</li> <li>– Project team leader meets with City staff to review recommended semi-finalists</li> <li>– City staff selects finalists for on-site interviews</li> <li>– Finalists complete candidate management style assessment, responses are reviewed and interview questions are developed</li> </ul>	
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### Task IV: conducting background checks, reference checks and academic verifications

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

#### Background checks will include information from the following areas:

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

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

Project milestone	Deliverables	Timeline
Design final process with City for on-site interviews with finalists	<ul style="list-style-type: none"> <li>– Baker Tilly confirms interviews with candidates</li> <li>– Travel logistics are scheduled for candidates</li> </ul>	1-2 days
Background checks, reference checks and academic verification	<ul style="list-style-type: none"> <li>– Baker Tilly completes background checks, reference checks and academic verifications of finalists</li> </ul>	2-3 weeks

### Task V: final interview process

Upon completion of Task IV, we will work with your City staff and/or designated staff to develop the final interview process. We customize the process according to your needs and desired outcomes, functions of the position, preference and directives. This may include steps that are important to you, our client. As such, the final interview process may include meetings with the department heads and the opportunity for a meet and greet

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with community members. Recognizing the impact of national, state or locally imposed restrictions in response to the COVID-19 Pandemic, we work with your organization to adjust all aspects of our process as you deem necessary and appropriate.

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

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

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

### Our strategy for recruitment of diverse candidates

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

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

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

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

At Baker Tilly, diversity, inclusion and belonging is *who we are* rather than *what we do*. Creating an environment where all team members are valued empowers us to bring our authentic selves to work each day. **When our contributions reflect our individual best, we achieve better results for Lathrup Village.**

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

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

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

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

**Day in, day out.**



DIBS steering committee



Supporting Opportunity, Advancement and Retention for all (SOAR)



Growth and Retention of Women (GROW)



PRIDE team member network



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



Baker Tilly Foundation support for racial justice advocacy



Tone from the top: CEO Action for Diversity & Inclusion



NexGen: joining workforce generations

### Timeline

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

City of Lathrup Village Executive Recruitment Preliminary Timeline		
The following timeline represents a preliminary schedule for your executive recruitment based on a mutually agreed upon commencement date. For the purpose of this proposal, we label Target Dates as To Be Determined (TBD). Our agreement will include actual and specific target dates developed, reviewed and approved by your organization.		
Project milestone	Deliverables	Target date
Profile development, advertising and candidate outreach	<ul style="list-style-type: none"> <li>Baker Tilly completes on-site interviews to develop candidate profile and recruitment brochure; the City approves ad placement schedule and timeline</li> <li>Baker Tilly sends draft recruitment brochure to the City</li> <li>The City returns draft recruitment brochure (with edits) to Baker Tilly</li> <li>Baker Tilly commences executive recruitment advertising and marketing</li> <li>Online data collection and profile development</li> </ul>	TBD
Applicant screening and assessment and recommendation of semi-finalists	<ul style="list-style-type: none"> <li>Baker Tilly commences formal review of applications; most promising candidates complete questionnaires</li> <li>Candidates complete recorded interview online</li> <li>Baker Tilly completes formal review of applications and sends selected resumes to the City for review</li> <li>Candidates' recorded interviews are presented</li> <li>Baker Tilly meets with the City and recommends semi-finalists; the City selects finalists for on-site interviews</li> <li>Finalists complete candidate management style assessment and responses are reviewed and interview questions are developed</li> </ul>	TBD
Comprehensive background check, academic verifications and reference checks completed for finalists	<ul style="list-style-type: none"> <li>Baker Tilly completes reference checks/background checks/academic verification on finalists</li> </ul>	TBD
On-site Interviews with finalists	<ul style="list-style-type: none"> <li>Baker Tilly sends documentation for finalists to the City</li> <li>The City conducts on-site interviews with finalists</li> </ul>	TBD
Employment offer made / accepted	<ul style="list-style-type: none"> <li>The City extends employment offer to selected candidate</li> </ul>	TBD

### Why Baker Tilly is ideally suited to serve Lathrup Village

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

#### **We are experienced and passionate about what we do**

Baker Tilly executive recruitment consultants are experienced and passionate about local government since all have spent a significant part of their professional careers in senior leadership positions for cities, counties and school districts. The Baker Tilly team has recruited and placed more than 1,400 executive-level positions within cities, counties, school districts and public and not-for-profit organizations since 2000.

#### **We are focused on exceeding your expectations**

We believe in local government and want to assist the City of Lathrup Village organization in building a great team. We want your organization to hire us again based on the success we achieve the first time we work together.

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

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

#### **We believe in diversity**

Our corporate core values and work environment reflect our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. We take responsibility for diversity in our organization, our recruitment strategy and our candidate pools. We are corporate members of the National Forum for Black Public Administrators (NFBPA) and the Hispanic Network and are on their National Corporate Advisory Council.

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

For an all-inclusive, not-to-exceed professional fee, which includes the cost of professional services by the project team leader, the project support staff and all project related expenses such as advertising, preparation of a recruitment brochure, background, reference and academic verification checks and travel expenses for up to three on-site visits. We work with you to establish a timeline, respond to the City's needs and to unexpected circumstances that may arise during the course of your recruitment in order to expedite the recruitment, but not at the expense of finding high quality candidates for Lathrup Village.

#### **We utilize the latest technologies that uniquely sets us apart**

Technology plays an important role in the Baker Tilly executive recruitment process. From our proprietary video interview system and our management/leadership style assessment analysis to our proprietary online application system, we efficiently manage candidate information and provide the City with unique information about each candidate's leadership and management style and ability to respond extemporaneously to video questions.

#### **We offer a “Triple Guarantee” that commits Baker Tilly to Lathrup Village's success**

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



### Benefits to Lathrup Village

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

#### **Comprehensive and structured process**

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

#### **Transparency**

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

#### **Confidentiality**

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

#### **Candidate recruitment**

Baker Tilly actively recruits qualified candidates, drawing from our extensive personal and professional connections with capable individuals around the state, region and nation, and assuring the City of its access to established managers and rising stars. The ability to widely recruit for prospective candidates is one of the primary benefits of using Baker Tilly.

#### **Focused use of the City's time**

Baker Tilly's comprehensive process incorporates the active participation of City staff members at key steps in the process. Our process keeps decision makers fully advised and informed of all aspects of the process without requiring them to expend large amounts of time on the recruitment process or to put aside other pressing issues facing the City.

#### **Minimize staff disruption**

Baker Tilly's search process also minimizes disruptions to Lathrup Village's staff, some of whom may have additional duties in this time of transition. Because conducting a thorough recruitment can be time-consuming, Baker Tilly's involvement allows staff to stay focused on their primary and assigned functions.

#### **Thorough evaluation of candidates**

The City of Lathrup Village seeks a City Manager/Administrator of sound professional and personal character. Baker Tilly's process includes a thorough evaluation of the final candidates, including detailed information from references and a careful review of background records.

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## 3. Recruitment project team

*We configured the Baker Tilly project team specifically to meet or exceed Lathrup Village's expectations.*

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



### Project team leader

**Edward G. Williams, Ph.D., Director**  
T: +1 (214) 842 6478  
E: [edward.williams@bakertilly.com](mailto:edward.williams@bakertilly.com)

### Additional project team members

**Art Davis, Director**  
T: +1 (816) 868 7042  
E: [art.davis@bakertilly.com](mailto:art.davis@bakertilly.com)

**Patricia Heminover, Director**  
T: +1 (651) 223 3058  
E: [patty.heminover@bakertilly.com](mailto:patty.heminover@bakertilly.com)

**Sharon Klumpp, Director**  
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E: [sharon.klumpp@bakertilly.com](mailto:sharon.klumpp@bakertilly.com)

**Anne Lewis, Director**  
T: +1 (703) 923 8214  
E: [anne.lewis@bakertilly.com](mailto:anne.lewis@bakertilly.com)

**Cecilia Hernández, Senior Recruitment Analyst**  
T: +1 (214) 736 1606  
E: [cecilia.hernandez@bakertilly.com](mailto:cecilia.hernandez@bakertilly.com)

**Michelle Lopez, Senior Recruitment Analyst**  
T: +1 (651) 223 3061  
E: [michelle.lopez@bakertilly.com](mailto:michelle.lopez@bakertilly.com)

## Edward G. Williams, Ph.D.

Edward Williams co-leads the public sector executive recruitment team and brings character, competence and expertise to every project.



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### **Languages**

English

Spanish

### **Education**

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

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

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

Edward has more than 20 years of collective experience in human resources and organizational development at various levels, and across various disciplines including, state and local government, community and educational institutions. Edward co-leads the Public Sector Executive Search Team and works with the directors to ensure effective, efficient, and responsive service delivery in public sector recruitments.

### **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

## Art Davis

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



#### **Baker Tilly US, LLP**

##### **Director**

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[bakertilly.com](http://bakertilly.com)

#### **Education**

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

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

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

#### **Specific experience**

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

#### **Industry involvement**

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

## Patricia Heminover

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



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##### **Director**

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#### **Education**

Master of Education, Administration  
Minnesota State University – Mankato

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

Bachelor of Science, Consumer Science, Business  
Administration  
Minnesota State University – Mankato

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

#### **Specific experience**

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

#### **Industry involvement**

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

#### **Continuing professional education**

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

## Sharon G. Klumpp

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



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##### **Director**

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#### **Education**

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

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

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

#### **Specific experience**

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

#### **Industry involvement**

- International City/County Management Association (ICMA)



## Anne Lewis

Anne Lewis co-leads the public sector executive recruitment team and brings nearly 20 years of local government management experience.



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**Director**

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bakertilly.com

**Education**

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

Bachelor of Science, Business Administration  
and Management  
Shenandoah University (Winchester, Virginia)

Prior to joining Baker Tilly, Anne served as an Assistant County Administrator for a Virginia county, a Deputy City Manager and an Assistant City Manager for two Virginia cities. Over the last 17 years, her experience in local government has also included positions as an Emergency Management Deputy Director, Public Information Officer, Human Resources Manager, Parking Authority Executive Director, Housing Director, Transit Director and Convention & Visitors Bureau Executive Director. She also has had responsibility for parks, recreation and community services, information technology, animal services, general services and legislative programs.

**Industry involvement**

- International City/County Management Association, Credentialed Manager (ICMA)
  - Task Force on Recruitment Guidelines Handbook
  - Task Force on Women in the Profession
  - Task Force on Internship Guidelines
- Virginia Local Government Management Association (VLGMA), former member of Executive Board
- Virginia Women Leading Government
- Government Finance Officers Association (GFOA)

**Community involvement**

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

**Continuing professional education**

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

## Cecilia Hernández

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



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bakertilly.com

#### Languages

English  
Spanish

#### Education

Bachelor of Science, Public Affairs  
University of Texas at Dallas (Richardson, Texas)

Master of Public Affairs with a Local Government  
Concentration  
University of Texas at Dallas (Richardson, Texas)

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

#### Specific experience

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

## Michelle Lopez

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



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bakertilly.com

#### Education

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

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

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

#### Specific experience

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

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## 4. References

Edward Williams is the designated project leader for your City Manager/Administrator executive search. Feel free to contact Edward, or any of the individuals listed, to verify the quality of work Baker Tilly has consistently delivered to each client as part of these recently completed executive recruitment projects.

### North Texas Municipal Water District

<b>Name</b>	Terry Sam Anderson	<b>Title</b>	Member, Board of Directors
<b>Phone</b>	(214) 801 8112	<b>Email</b>	<a href="mailto:tsa@bjanderson.net">tsa@bjanderson.net</a>
<b>Services</b>	Executive Director/General Manager executive search (2021)		

### City of Corpus Christi, Texas

<b>Name</b>	Eyvon McHaney	<b>Title</b>	Human Resources Director
<b>Phone</b>	(361) 826 3979	<b>Email</b>	<a href="mailto:EyvonMc@cctexas.com">EyvonMc@cctexas.com</a>
<b>Services</b>	Assistant City Manager executive search (2021)		

### Fulton County Government, Georgia

<b>Name</b>	Kenneth L. Hermon, Jr.	<b>Title</b>	Director of Personnel
<b>Phone</b>	(404) 613 0923	<b>Email</b>	<a href="mailto:Kenneth.Hermon@fultoncountyga.gov">Kenneth.Hermon@fultoncountyga.gov</a>
<b>Services</b>	Clerk to the Commission executive search (2020)		

### City of Plant City, Florida

<b>Name</b>	George Williams	<b>Title</b>	HR & Risk Management Director
<b>Phone</b>	(813) 659 4200, ext. 4201	<b>Email</b>	<a href="mailto:gwilliams@plantcitygov.com">gwilliams@plantcitygov.com</a>
<b>Services</b>	Police Chief executive search (2020)		

### City of Paris, Texas

<b>Name</b>	Gene Anderson	<b>Title</b>	Finance Director
<b>Phone</b>	(903) 784 9241	<b>Email</b>	<a href="mailto:ganderson@paristexas.gov">ganderson@paristexas.gov</a>
<b>Services</b>	City Manager executive search (2020)		

## 5. Experience

Below is a partial list of relevant public sector executive recruitments delivered by the Baker Tilly team since 2016.

List of relevant projects: 2016 to present				
Year	Client	State	Project	Population
Current	Belton	MO	City Manager	23,480
Current	Blue Springs	MO	City Administrator	54,850
Current	Denton	TX	City Manager	136,195
Current	Grand Rapids	MI	Deputy City Manager	192,294
Current	Greeley	CO	City Manager	105,888
Current	Huber Heights	OH	City Manager	40,006
Current	Joplin	MO	Assistant City Manager	50,386
Current	Kearney	NE	City Manager	33,464
Current	La Marque	TX	City Manager	16,627
Current	Minnetrista	MN	City Administrator	7,621
Current	North Kansas City	MO	City Administrator	4,477
Current	Oak Hill	TN	City Manager	4,587
Current	Overland Park	KS	City Manager	191,278
Current	Salisbury	NC	City Manager	33,727
Current	Spicer	MN	City Administrator	1,188
Current	Stonecrest	GA	City Clerk	54,202
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	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	Rockville	MD	Deputy City Manager	66,940
2021	Shakopee	MN	Assistant City Administrator	40,731
2020	Eau Claire	WI	City Manager	68,866
2020	Fairmont	MN	City Administrator	10,126
2020	Front Royal	VA	Town Manager	15,239
2020	Herington	KS	City Manager	2,304

## C. Key personnel

### List of relevant projects: 2016 to present

Year	Client	State	Project	Population
2020	Kansas City	MO	City Manager	488,943
2020	Lake Ozark	MO	Assistant City Administrator/Community Economic Development Director	1,792
2020	Maple Plain	MN	City Administrator	1,807
2020	Matanuska-Susitna Borough	AK	Borough Manager	108,317
2020	Missouri City	TX	City Manager	74,705
2020	Moose Lake	MN	City Administrator	2,798
2020	Oakdale	MN	City Administrator	28,083
2020	Rochester	MN	City Administrator	114,011
2020	Scottsbluff	NE	City Manager	14,874
2020	St. Joseph	MO	City Manager	74,959
2019	Beeville	TX	City Manager	12,937
2019	Cloquet	MN	City Administrator	11,938
2019	Hobbs	NM	City Manager	37,764
2019	Lake Lotawana	MO	City Administrator	2,099
2019	Norman	OK	City Manager	122,843
2019	Paris	TX	City Manager	24,800
2019	Park City	KS	City Administrator	7,499
2019	Port Arthur	TX	City Manager	53,937
2019	Willmar	MN	City Administrator	19,628
2018	Addison	TX	City Manager	15,368
2018	Asheville	NC	City Manager	89,121
2018	Ashland	OR	City Administrator	21,636
2018	Avondale	AZ	City Manager	82,881
2018	Belle Plaine	MN	City Administrator	6,838
2018	Billings	MT	City Administrator	110,323
2018	Burnsville	MN	City Manager	61,434
2018	Christiansburg	VA	Town Manager	21,533
2018	Grand Rapids	MI	City Manager	192,294
2018	Herington	KS	City Manager	2,362
2018	Kingman	AZ	City Manager	29,029
2018	Maricopa	AZ	City Manager	46,903
2018	Middleburg	VA	Town Administrator	828
2018	Mora	MN	City Administrator/Public Utilities General Manager	3,453
2018	Salina	KS	City Manager	46,994
2018	Shawnee	KS	City Manager	64,323
2018	York	PA	Business Administrator	43,859
2017	Berthoud	CO	Town Administrator	5,807
2017	Christiansburg	VA	Town Manager	21,533
2017	Cloquet	MN	City Administrator	11,938



## C. Key personnel

### List of relevant projects: 2016 to present

Year	Client	State	Project	Population
2017	Dickinson	TX	City Administrator	19,595
2017	El Dorado	KS	City Manager	12,852
2017	Glenview	IL	Village Manager	45,417
2017	Lake Havasu City	AZ	City Manager	53,743
2017	Littleton	CO	City Manager	44,275
2017	Manassas Park	VA	City Manager	16,149
2017	Morehead City	NC	City Manager	9,203
2017	Mounds View	MN	City Administrator	12,525
2017	Oldsmar	FL	City Manager	13,913
2017	Orono	MN	City Administrator	8,009
2017	Riviera Beach	FL	City Manager	33,263
2017	Rochester	MN	City Manager	110,742
2017	Township of Roxbury	NJ	Township Manager	23,324
2016	Brooklyn Center	MN	Deputy City Manager	31,006
2016	Cary	NC	Town Manager	151,088
2016	Charter Township of Kalamazoo	MI	Township Manager	20,918
2016	Christiansburg	VA	Town Manager	21,533
2016	Circle Pines	MN	City Administrator	4,953
2016	Commerce	TX	City Manager	8,276
2016	Crested Butte	CO	Town Manager	1,519
2016	Deerfield Beach	FL	Assistant City Manager	78,041
2016	Denton	TX	City Manager	123,099
2016	Dumfries	VA	Town Manager	5,168
2016	Fredericksburg	VA	City Manager	28,132
2016	Greensboro	NC	Assistant City Manager, General Government	279,639
2016	Hayden	CO	Town Manager	1,801
2016	Jersey Village	TX	City Manager	7,862
2016	Mankato	MN	Deputy City Manager	40,641
2016	Medford	OR	City Manager	77,677
2016	Mooresville	NC	Town Manager	34,887
2016	Moorhead	MN	City Manager	39,398
2016	Moose Lake	MN	City Administrator	2,787
2016	North Branch	MN	City Administrator	10,087
2016	Roswell	NM	City Manager	48,611
2016	Shakopee	MN	Assistant City Administrator	39,167
2016	Virginia	MN	City Administrator	8,661
2016	Warsaw	VA	Town Manager	1,498
2016	Wayzata	MN	City Manager	4,217
2016	Williamsburg	VA	Assistant City Manager	15,206

## 6. Proposed cost

*Below is the proposed, all-inclusive professional fee to conduct this recruitment.*

### Professional fee

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

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

Phase	Description of professional services	Fee
Phase I	Task 1 Project kickoff; candidate profile; development of marketing, recruitment and outreach strategy (includes virtual or in person project team leader consultation with elected officials, hiring authorities or designee)	
Phase II	Task 2 Acknowledge applications and begin reviewing and classification of all applicants Task 3 Develop and assign Due Diligence Questionnaire, Applicant Questionnaire, One-Way Video Interview questions (customized to each search); review responses; prepare electronic Semi-Finalist Report for client evaluation and selection of potential finalists (includes virtual or in person project team leader consultation with elected officials, hiring authorities or designee) Task 4 Secure up to ten references; conduct background check that includes, but is not limited to consumer credit, bankruptcy, city/county (criminal), state district superior court, city/county (civil litigation), state district superior court (civil litigation), judgments/tax liens, federal district (criminal), motor vehicle driving record, federal district (civil litigation), academic credentials verification, professional certification verification, social security, sex offender registry, etc.; administer leadership/management assessment, Finalist Report, (resumes, cover letter, Due Diligence Questionnaire, Candidate Questionnaire Response, Reference Report, media presence and social media check report)	
Phase III	Task 5 Interview process preparation, invitations, technical support, suggested interview questions; final process/on-site interviews with finalists (includes on site or virtual assistance by project team leader)	
Conclusion	Assistance and technical support for total rewards (salary and benefits), employment offer negotiation, offer and acceptance by finalist	
<b>TOTAL ALL-INCLUSIVE PROFESSIONAL FEE</b>		<b>\$24,500*</b>

\* Baker Tilly may consider a professional fee reduction by 10% for each subsequent executive recruitment, not to exceed 25% of the proposed cost on any single search during the subsequent 12-month period.

## 6. Proposed cost

Phase	Description of professional services	Fee
Phase I	Task 1 Project kickoff; candidate profile; development of marketing, recruitment and outreach strategy (includes one day virtual or in person project team leader consultation with elected officials, hiring authorities or designee)	\$4,850
	Task 2 Acknowledge applications and begin reviewing and classification of all applicants	\$4,850
Phase II	Task 3 Develop and assign Due Diligence Questionnaire, Applicant Questionnaire, One-Way Video Interview questions (customized to each search); review responses; prepare electronic Semi-Finalist Report for client evaluation and selection of potential finalists (includes one day virtual or in person project team leader consultation with elected officials, hiring authorities or designee)	\$6,150
	Task 4 Secure up to eight references; conduct background check that includes, but is not limited to consumer credit, bankruptcy, city/county (criminal), state district superior court, city/county (civil litigation), state district Superior court (civil litigation), judgments/tax liens, federal district (criminal), motor vehicle driving record, federal district (civil litigation), academic credentials verification, professional certification verification, social security, sex offender registry, etc.; administer leadership/management assessment, Finalist Report, (resumes, cover letter, Due Diligence Questionnaire, Candidate Questionnaire Response, Reference Report, media presence and social media check report)	\$3,800
Phase III	Task 5 Interview process preparation, invitations, technical support, suggested interview questions; final process/on-site interviews with finalists (includes two days on site or virtual assistance by project team leader)	\$4,850
Conclusion	Acceptance of offer by candidate	
<b>TOTAL ALL-INCLUSIVE PROFESSIONAL FEE</b>		<b>\$24,500*</b>

\* Baker Tilly may consider a professional fee reduction by 10% for each subsequent executive recruitment, not to exceed 25% of the proposed cost on any single search during the subsequent 12-month period.

Optional services for consideration	Fee
At your request, Baker Tilly can conduct a web-based community survey to help your organization identify key issues or priorities that your organization may consider as you launch an executive search. Depending on your need, we administer the survey, which your residents, community leaders, employees or designated key stakeholders may complete. Please note that this type of survey may alter the overall project timeline.	<b>\$1,650</b>
On rare occasions, a client desires the delivery of additional search related services from the Baker Tilly executive search team. Services not included in the proposed scope of services include additional visits by the project team leader to your organization. Baker Tilly will bill the City at an hourly rate of \$220, plus expenses for additional work specifically requested by your organization that is outside of the scope of this project or as described in the proposed scope. Prior to beginning these services, Baker Tilly will prepare and submit a written explanation of the additional services requested and the estimated number of hours required prior to commencing any additional services.	<b>\$220 per hour plus expenses</b>

### Triple guarantee

We define the success of a smooth, seamless, effective and responsive executive recruitment that culminates with the hiring of an accomplished City Manager/Administrator who matches the profile we developed to this end. We further define success by the identification and presentation of an acceptable number of well-qualified applicants for the City staff members 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 tri-fold, industry leading triple guarantee.

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

### Negotiations

If selected, we will provide Lathrup Village 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.

# Appendix I: sample brochure

Following is a sample brochure designed and used to support a recent executive search.

City Manager Executive Search, Port Arthur, TX





# PORT ARTHUR, TEXAS

*INVITES QUALIFIED CANDIDATES TO APPLY FOR*

# CITY MANAGER

## THE COMMUNITY

The City of Port Arthur (population 50,074) is located from the coastline of Sabine Pass and the Gulf of Mexico; 91 miles east of Houston along Interstate 10, to the beautiful Taylor Bayou in Jefferson County, Texas. The City has extraterritorial jurisdictions, and is a part of the Golden Triangle (a portion of Southeast Texas which also includes the metropolitan areas of Beaumont and Orange). Incorporated in 1932, covering an estimated 92,376.8 acres of coastal land, the City of Port Arthur is home to several manufacturing industries, and refineries such as Chevron-Phillips, Valero, and Motiva Enterprises. This industrial city, home to one of the nation's top refineries and petrochemical industries, produces an estimated 185,000 barrels of products such as diesel and gasoline per day. As a port of entry, the Port of Port Arthur accounts for an estimated trade value of \$22.9 billion, according to the Texas Comptroller of Public Accounts. The City's strong economy, unique history, diverse community and thriving regional growth are key factors in the role it plays in the petroleum and cargo shipping industries. Port Arthur offers its residents, and visitors, an inviting lifestyle with a "small-town feel," close to the attractions and amenities of a major urban center with culture, recreation, shopping and dining for almost any taste. Each year, the City of Port Arthur, in a nod to its rich Cajun culture, offers the Cajun Fest, complete with a crawfish-eating contest, and the annual Lighted Holiday Parade.

The City of Port Arthur also has a number of public facilities, including the Robert A. "Bob" Bowers Civic Center, and the Port Arthur Public Library. The City sits along the Gulf coast, and attracts tourists with its natural spaces and attractions such as Pleasure Island, the McFaddin National Wildlife Refuge, and the Sabine Loop Wildlife Trail. Alongside this, the City also has over 755 acres that contain a recreation center, the Pavilion Downtown, and a large park system. Amenities such as sports courts and fields, and outdoor swimming pools are available for sports and leisure activities.

The proposed budget for 2019-2020 fiscal year operating budget is \$72.3 million, with estimated expenditures of \$68.6 million. This budget is part of a five-year plan focused on the methodical recovery from the damages caused by Tropical Storm Harvey, while remaining focused on the City's Capital Projects. City staff includes 650 employees; total annual budget \$141 million.

The City of Port Arthur would be a great place for the new City Manager to live, work, and play. For more information about Port Arthur, please visit their website at <https://www.portarthurtx.gov/>.







## ABOUT THE CITY MANAGER

The City of Port Arthur, approved per Home Rule Charter in 1979 has a Council-City Manager form of government. The City Council is composed of a Mayor and six Council members. Of those six (6) council members, Port Arthur residents elect four (4) from single-member districts, and two (2) positions are elected At Large. Each elected council member may serve three (3) years, for a maximum of three consecutive terms (term limit).

The City Council approves City Policy, and the City Manager is responsible for the City's employees and its daily operations. According to the Code of Ordinances, the City Council appoints the City Manager. He or she is the Chief Administrative and Executive Officer of the City. The City Manager must reside within the limits of the City of Port Arthur during his or her tenure. The City of Port Arthur seeks a manager whose attributes, leadership traits, management style, and personal and professional characteristics are consistent with the following:

- The ideal candidate will be fiscally prudent and able to prepare, oversee and effectively manage the city's budget according to the objectives and goals approved by the City Council. He or she must possess a track record of exceptional servant leadership, self-confidence, and intellect such as that acquired through education, experience, knowledge of best practices in municipal government, and unquestionable personal and professional integrity.
- The new City Manager must demonstrate an ability to effectively and efficiently communicate with City Council, residents, boards, commissions, business, and employees, state, federal and local governments, and community organizations.
- The new City Manager must demonstrate effectiveness, and responsiveness in handling the day-to-day operations of the city, including the challenges faced by a coastal community, economic development, and industry, including successful contract negotiation skills, professional traits and attributes, and working closely with business, developers, attorneys, vendors, visitors, other governments and nonprofit organizations.
- The ideal candidate must have a verifiable record of economic development success and a keen understanding and appreciation for the symbiotic relationship that exists between business and community, working with economic development policies, tax increment financing, tax abatement, and other public incentive tools that may be available, whereby the success of one is dependent on the other serves as an essential qualification.
- He or she must bring a high level of proficiency, integrity and a profound understanding of municipal budgeting and finance; budget preparation and presentation, and success in achieving established goals and objectives.

# ABOUT THE CITY MANAGER

- The new City Manager will bring outstanding interpersonal skills to the organization; he or she is confident, yet humble, able to listen to divergent perspectives or points of view, and manage as a skilled consensus builder.
- The ideal individual will demonstrate outstanding communication skills, and able to effectively and efficiently deal with all members of the community, including city council members, but not limited to citizens, employees, department heads, business owners, developers, civic and business leaders, in an open, honest, frank and respectful manner.
- The new City Manager must have a profound instinct, excellent discernment, a sense of humor and the ability to say “no” when necessary.
- He or she is cooperative, respectful of the community and organizational traditions, while simultaneously moving the organization forward in a positive and progressive direction.
- The City Manager will be receptive to, and embrace, new technologies that may promote innovation throughout the organization and community.
- He or she must be politically astute, and be able to remain neutral even in politically-charged situations. Furthermore, he or she must have the ability to build a strong and cohesive workforce by partnering with all departments to create an effective and efficient service delivery team, unified by the goals and ideals of the organization.
- He or she must inspire staff, model excellence in leadership, champion employee and organizational development, be transparent, honest, approachable, collaborative, and will model excellence via his or her own actions.



## PARTIAL LIST OF DUTIES

- Ensure the enforcement and compliance with all laws and city ordinances;
- Appoint or remove department heads, and all subordinate officers and employees, except as otherwise provided by the Fire and Police Civil Service Law, and the City Charter; attend all City Council meetings; present written recommendation to the City Council as necessary or expedient; keep the City Council fully advised, at all times, of the financial condition and needs of the City.
- Ensure that the City of Port Arthur operates within its approved yearly budget;
- Prepare and submit annual budgets to the Council, and implement Council-approved budget items;
- Develop and execute contracts and/or agreements on behalf of the City of Port Arthur via Council-approved ordinances or resolutions;
- Make policy recommendations to the City Council, and furnish the members with necessary and essential information to ensure that the City Council has sufficient time to review, and make sound decisions;
- Supervise and direct the work of City departments and divisions, and the administrative officers, except those of the City Judge, City Attorney, and the City Secretary;
- Perform other duties as prescribed by the City Charter (City Ordinance) or by City Council.





## OPPORTUNITIES FOR THE NEW CITY MANAGER

The next Port Arthur City Manager will have an opportunity to demonstrate his/her ability to meet the following achievements within his or her first two years of employment. (This list is representative, and not all inclusive, but a sample of the opportunities for organizational, personal and professional success.)

- **Strong Leadership and Relationship Building:** – An opportunity to establish him or herself in the community and champion effectiveness, efficiency and results, through the adoption of best practices in city management, visibility, and accessibility. She or he must be able to guide the city through emergency management crises and recovery, economic development and continuous improvement.
- **Capital Improvement Programs:** – The new city manager will have an opportunity to champion the development, and implementation, of an organizational strategic plan aimed at completing approved Capital Improvement Projects.
- **Strategic Planning Initiative:** – The new City Manager will work closely with the City Council to establish a collective organizational mission, vision, values, goals, objectives and council-established priorities to create a new Strategic Plan.
- **Budget and Financial Management:** – The new City Manager will lead the development and implementation of the City's annual budget, following the tenets of fiscal accountability, efficiency and fiscal discipline.
- **Economic Development and Branding:** – As a community heavily dependent on the oil and gas industry, and a number of established and ongoing development opportunities, including the redevelopment of the downtown area, the new City Manager will have an opportunity to make a lasting impact on the current and future infrastructure of the City of Port Arthur. He or she will also have the opportunity to lead a branding, marketing and outreach campaign that highlights the natural beauty, historical landmarks and local attractions of the city.



## QUALIFICATIONS AND EXPERIENCE

Eligible candidates will hold a Bachelor's degree in business administration, finance, marketing, or a closely related field. A minimum of eight (8) years of related professional experience serving a thriving community of similar size and service delivery are required.

A Master's in public administration, ten (10) years of progressively responsible professional municipal management experience, and Certification by the International City/County Management Association (ICMA) is preferred.

Work is primarily sedentary in nature, in an office setting. There are no special physical demands. However, to successfully perform the essential functions of this position the incumbent may regularly be required to talk or hear. He or she may be required to use hands or fingers, handle or feel objects, tools, or controls. Similarly, he or she may be occasionally required to stand, walk, sit, and reach with hands and arms, and occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this position include close vision, distance vision, and the ability to adjust focus. The noise level in the work/office environment is usually low to moderate. The City may make reasonable accommodations to enable individuals with disabilities to perform the functions.

## COMPENSATION AND BENEFITS

The City Manager is the city's chief administrative officer for city matters relating to the official powers and duties and reports to, and serves, at the pleasure of the City Council. The City of Port Arthur offers a comprehensive total benefits package, which includes a base salary range of \$177,694 - \$203,356 DOE, \$650/month vehicle allowance, 100% paid individual health insurance, subsidy for dependent(s) is available; \$100/monthly phone allowance; City-issued laptop or similar device, life insurance, deferred compensation contribution, and much more.

For more details on the city and its benefits, click on the following link – [Port Arthur Benefits](#)



## APPLICATION AND SELECTION PROCESS

Qualified candidates should submit their cover letter and resume online by visiting our website at

<https://bakertilly.recruitmenthome.com/postings/2419>

The position is open until filled with a first review of candidates occurring on **Friday, October 11, 2019**. Following the first review date, resumes will be screened against criteria outlined in this brochure. Final interviews in Port Arthur will be offered by the City to those candidates named as finalists, with reference and background checks, and academic verifications, conducted after receiving candidates' permission.

For more information, please contact:

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*The City of Port Arthur is an Equal Opportunity Employer and values diversity at all levels of its workforce!*



now joined with  
Springsted and Umbaugh

14285 Midway Road  
Suite 340  
Addison, TX 75001

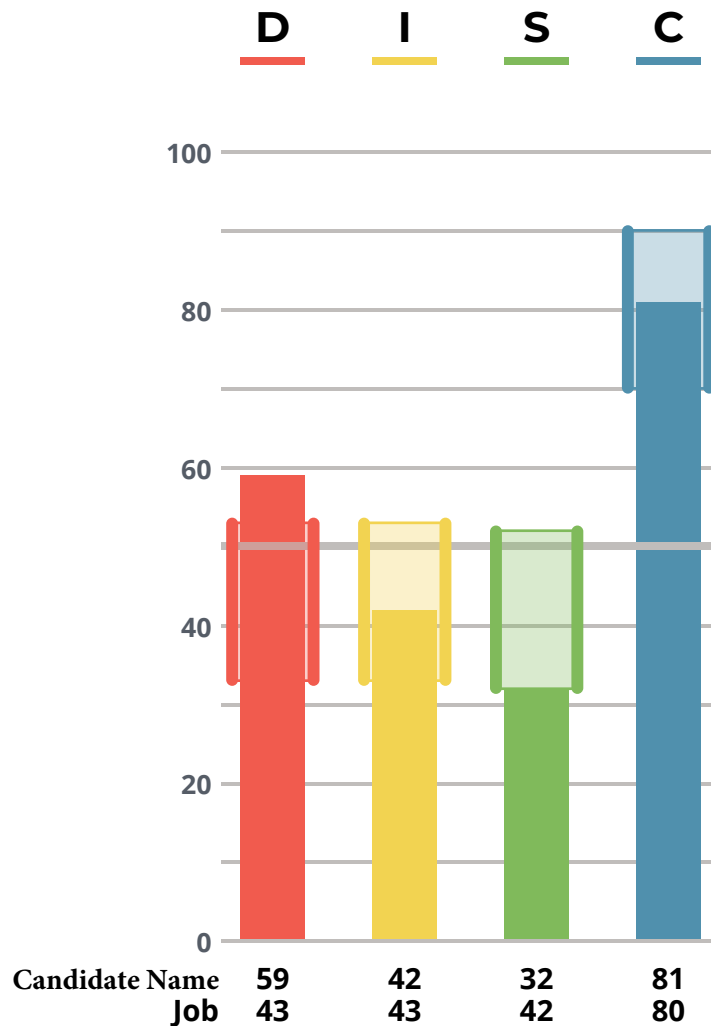
## **Appendix II: sample excerpt of TTI report**


# Workplace Behaviors®



## Candidate Name

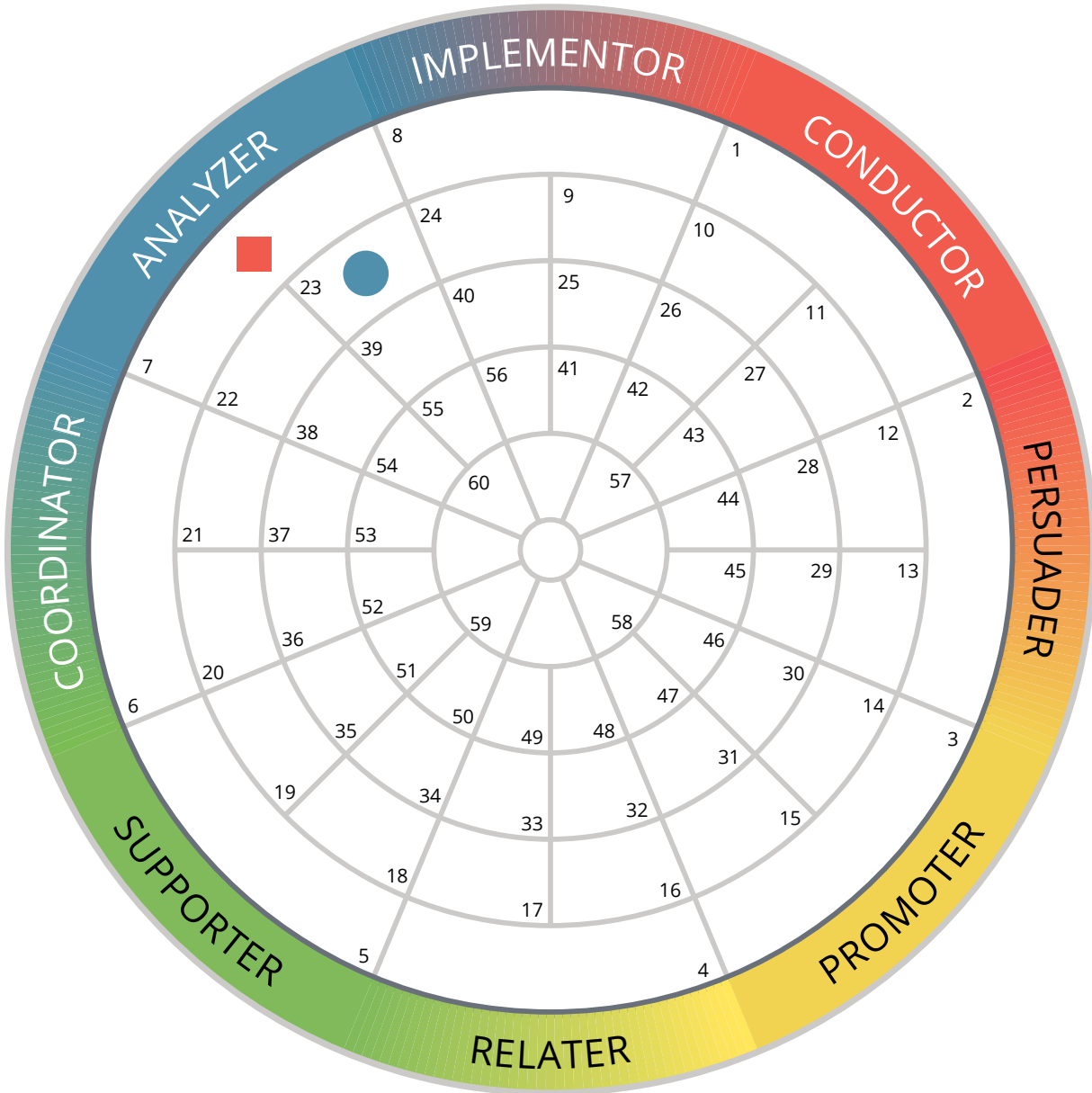
The following graph is designed as a visual comparison between the position and the applicant for each behavioral factor. The highlighted area denotes the position-related score for each behavioral factor. The applicant's score is denoted by the darker red, yellow, green and blue line. The closer the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



 Job Range (20 point range)



# 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