



October 6, 2021

Alissa Angelo, Assistant City Manager  
City of Stayton  
362 N. 3<sup>rd</sup> Avenue  
Stayton, OR 97383

Dear Ms. Angelo:

Thank you for the opportunity to submit our recruitment proposal for the position of City Manager for the City of Stayton. We take great pride in providing our clients exceptional service and excellent results. These successful client partnerships result from an active and comprehensive level of Principal involvement leading to positive business relationships and highly satisfied clients.

We feel well suited to support your city on this search. Currently, we are conducting City Manager recruitments for the California cities of Malibu, Cupertino, Yreka, and Ross, and recently completed City Manager searches for the cities of Tulare, Paso Robles, Sausalito, and Fowler. Additionally, in the past 24 months we've completed City Manager searches for the cities of Stockton, Simi Valley, Hawthorne, Whittier, Port Hueneme, Pinole, and Sand City. Overall, during the past four years our firm has completed 29 city manager assignments including recruitments for the cities of 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. We are also familiar with Oregon having previously completed projects for Lake Oswego, Astoria, Woodburn and Ashland.

Our extensive database of executives in municipal 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 of these contacts would be an excellent resource in support of this recruitment.

Following review of our proposal, it is our hope that our history of successful recruitments, our professionalism and 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

William Avery & Associates, Inc.  
Consultants to Management

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- Completed City Manager Recruitments
- Recruitment Team
- Recruitment Strategy
- Recruitment Schedule
- Consulting Fee
- Guarantees & Ethics

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 Avery*

William H. Avery

WHA:jmc



## PROPOSAL FOR THE CITY OF STAYTON 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, Kristi Ward and Sam Avery, who support the search practice and the firm's administrative staff includes Tomi Ewing, Jackie Collins and Michelle Ross. 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 the area of 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 of 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.



City Manager Recruitments Completed within the Past three Years

<b>Organization</b>	<b>Position</b>	<b>Filled</b>
City of Tulare	City Manager	9/2021
City of Paso Robles	City Manager	9/2021
City of Sausalito	City Manager	5/2021
City of Fowler	City Manager	2/2021
City of Foster City	City/District Manager	12/2020
City of Hawthorne	City Manager	3/2020
City of Port Hueneme	City Manager	2/2020
City of Stockton	City Manager	1/2020
City of Simi Valley	City Manager	1/2020
City of Pinole	City Manager	12/2019
City of Whittier	City Manager	11/2019
City of Sand City	City Manager	11/2019
City of Lafayette	City Manager	8/2019
City of Tulare	City Manager	6/2019
City of Martinez	City Manager	3/2019
City of Half Moon Bay	City Manager	10/2018
City of Hermosa Beach	City Manager	9/2018
City of Fremont	City Manager	8/2018

Recruitment Team for the City of Stayton

Bill Avery will serve as the Project Lead for this assignment and will be assisted by Bill Lopez. 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 Plan

I. Position Profile and Organizational Assessment

The initial assessment phase is a critical component of the search process. Mr. Avery will individually meet with members of the City Council and as appropriate, members of the City's leadership team to discuss the organizational needs and position requirements and to formalize the job description. Our goal for this aspect of the recruitment process is 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 position description and a subsequent 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.
- Public information sources that include various membership listings such as the League of Oregon 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 are able to 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 Schedule

We have the capacity to be available within a one-to-two week window to initiate new recruitments.

Task	Scheduled Dates
<i>Search Initiation, Marketing &amp; Advertising Development:</i> <ul style="list-style-type: none"> <li>▪ <i>Initial meetings with city manager and city staff to define the ideal candidate profile</i></li> <li>▪ <i>Develop draft of recruitment brochure for approval by client</i></li> <li>▪ <i>Recruitment strategy finalized</i></li> <li>▪ <i>Determination of advertising scope and placement deadlines</i></li> <li>▪ <i>Brochure designed and printed</i></li> </ul>	<i>Weeks 1 - 4</i>
<i>Marketing, Advertisement and Outreach Period:</i> <ul style="list-style-type: none"> <li>▪ <i>Mailing of brochures</i></li> <li>▪ <i>Jobs Available</i></li> <li>▪ <i>ICMA newsletter and website</i></li> </ul> <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 &gt;17</i>
<i>Report to Work Date</i>	<i>Week &gt;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 \$7,400 at the outset of the search. A second invoice of \$6,000 would be billed with the presentation of candidate recommendations and the final invoice of \$6,000 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 on a monthly basis.

## 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 is 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.

