

MEMORANDUM

TO: Board of Trustees

FROM: Erin Feore
Director of Human Resources

SUBJECT: Review and select from the proposed Executive Search firm agencies **AND** Authorize Director of Human Resources and Interim General Manager to engage with said agency for General Manager recruitment services in a not-to-exceed amount of \$50,000

RELATED STRATEGIC: Long Range Principle #4 - Workforce
PLAN INITIATIVE(S)

DATE: August 18, 2023

I. RECOMMENDATION

After careful consideration of the proposals submitted, the Director of Human Resources believes collaborating with **either** Bob Hall and Associates or Koff and Associates will ensure an expedient and cost effective partnership with recruitment services for the General Manager position currently open with the District. The anticipated not-to-exceed amount for this effort is \$50,000.00 which is currently unbudgeted.

II. BACKGROUND

As noted during the August 9th Board of Trustees meeting, the Director of Human Resources has vetted various Executive Search firms to provide recommendations to the Board of Trustees.

Over the course of three weeks, the Human Resources team met with six vendors who provide Executive Search resources for both public and private agencies. Of the six vendors contacted, three submitted service proposals for review. Each of these proposals is included with this memo. A summary of their information is noted below:

- Bob Hall & Associates has vast experience working with local municipalities as well as two of the largest Homeowner's Associations in California. As noted in their proposal, these organizations encompass venue industries to include Golf, Tennis, Food and Beverage, etc. While Mr. Hall's agency is smaller than the others, Mr. Bob Hall has assured his understanding of the urgency and importance of filling this extremely important position; further,

he understands that while ensuring the selected candidates have a public sector background, corporate experience is equally as important for the position of the Incline Village General Improvement District's General Manager.

- Koff and Associates is a large organization with satellite offices located throughout the western United States region. The Recruitment Manager, Frank Rojas, has decades of recruitment experience placing corporate leaders, executive, professional and technical staff and has worked with the government sector as well as non-profits, aerospace, architectural, engineering, information technology, etc. As noted in the proposal, Mr. Rojas has been responsible for the successful recruitment for numerous Director and General/City Manager positions throughout California. It should be noted that the District partnered with Koff and Associates back in 2016 to complete an extensive salary survey for District staffing. The reporting returned was timely, precise and has been utilized by several departments throughout the District.
- KornFerry is a national consulting firm that specializes in employment related initiatives to include organizational strategy, assessment and succession planning, talent acquisition and executive search, leadership develop, etc. KornFerry works to ensure a thorough understanding of the District's expectations of the open position to engage with candidates who would be best suited for the position.

III. FINANCIAL IMPACT AND BUDGET

It should be noted that each of these agencies has recommended the District first source its new General Manager before starting the recruitment process for the Director of Finance position. As explained, finding a top candidate for the Director of Finance position will be difficult, at best, until such time as the candidate knows who his or her leader will be. Therefore we anticipate the present contract should be not to exceed \$50,000 to cover the District General Manager search.

IV. ALTERNATIVES

As the District General Manager is the employee of the Board of Trustees, Staff welcomes any thoughts or recommendations from the Board at this meeting.

V. COMMENT

It is anticipated that, if approved, the team would immediately engage with the selected firm. The firms have made us aware that this recruitment could take up to

6 months. Staff will keep the Board of Trustees informed, via the monthly General Manager's report, on the progress of this project.

VI. DISTRICT IMPROVEMENT, COST REDUCTION, RETURN ON INVESTMENT OR PRODUCTIVITY ENHANCEMENT

Not applicable to this agenda item.

VII. ATTACHMENTS

Bob Hall and Associates – IVGID GM & Director Level Proposal
Koff & Associates – IVGID Executive Level Proposal
KornFerry – IVGID GM & Director Proposal

X. DECISION POINTS NEEDED FROM THE BOARD OF TRUSTEES

The Board of Trustees needs to select the Executive Search firm and authorize the Director of Human Resources and Interim General Manager to engage in services with said agency.

August 4, 2023

Dear Chairman Dent and Board of Trustees:

Bob Hall & Associates is pleased to submit this proposal to conduct the recruitment for the position of General Manager of Incline Village General Improvement District.

If selected, Bob Hall will be the point of contact and lead project director for this search. As former City Manager of Laguna Niguel, Stanton, and Fountain Valley, Bob Hall's substantial knowledge and experiences will help Incline Village General Improvement District find a candidate that fits the ideal criteria for the position. No one has a better pulse on the challenges that Cities and Special Districts face than Bob as a former City Manager. Recent recruitments by Bob Hall include the Cities of Manteca, Tracy, Morro Bay, San Bernardino, Laguna Hills, Fountain Valley, American Canyon, Laguna Niguel, San Clemente, Laguna Woods Village and Rancho Santa Fe Association.

While not a large firm, Bob Hall & Associates' network encompasses a strong talent pool and will add the personal, individualized attention that each search requires. Attached is a summary of the search process and the services that the Bob Hall & Associates team is willing and able to offer Incline Village General Improvement District.

For more information or clarification, do not hesitate to contact Bob Hall at (714) 309-9104 or by email at bob@bobhallandassociates.com. We appreciate the opportunity to be considered to aid in the search for the City Manager vacancy. Should you select our team, we are prepared to proceed immediately.

Sincerely,



Bob Hall

Executive Summary

We are excited to submit our proposal to the Incline Village General Improvement District for the opportunity to assist with the identification and recruitment for the General Manager position. The Bob Hall & Associates team is well connected throughout California with a keen knowledge of talent and is prepared to offer a strong pool of top candidates. At Bob Hall & Associates, we pride ourselves in adding a personal, individualized touch to each recruiting search. In the last 48 months, the Bob Hall & Associates team has conducted more than 85 recruitments across the state of California.

In addition to recruiting for local municipalities, Bob Hall & Associates has experience recruiting for positions within two of the largest Homeowners' Associations in the State of California. These organizations have recreation departments including golf and tennis clubs, along with food and beverage staff, similar to that of the departments at Incline Village General Improvement District.

We provide an alternative to the large recruitment firms while providing excellent customer service focused specifically on our clients' needs to ensure we meet or exceed their expectations on every recruitment. Our individualized service helps target candidates who are equipped to specific needs within the region. We do not stray from a challenge and thrive in filling the tough to find positions at all levels throughout the organization. Our work ethic and desire to help our clients succeed is second to none. Given the structure of our firm, we have the ability to adjust our processes to fit the specific needs of our customers, whether it is recruitment timeline, outreach strategies, or even interview structures.

Bob Hall brings over 30 years of experience in municipal government and leadership. Hall has served as City Manager for Fountain Valley, Laguna Niguel, and Stanton. His prior City Manager experience gives him a unique perspective on the recruiting process. He knows first-hand the talent it takes to build a high-performance operation and wants to share that knowledge and experience with candidates and municipalities. His wide variety of experience throughout municipal organizations provides a strong understanding of the diverse needs throughout the City. Before assuming the leadership role in Orange County, he worked in many departments, including General Services Director for the City of Riverside.

Bob Hall holds a Master's degree in Public Administration from California State University, San Bernardino. Hall is a member of ICMA, former Board Member of Cal ICMA and has been an invited guest lecturer at Cal-State Northridge, Cal-State Fullerton, and Long Beach State University.



The Team and Recent Placements

Our Recruitment Team

Bob Hall

Founder, Bob Hall & Associates

With Bob’s 30 plus years of experience serving in most departments within a municipal organization, he brings a strong knowledge and understanding of city operations. This diverse knowledge has translated into Bob Hall & Associates keen ability to place highly qualified candidates in key positions. Bob’s niche is finding that “perfect fit”, especially in positions that traditionally are more challenging to fill. Bob Hall provides individualized customer service and responsiveness resulting in successful placements and ultimately, client satisfaction.

Rachel Hall

Recruitment Manager

Rachel has a Bachelor of Arts in Communication from the University of Arizona and brings a background in marketing and writing to the team. Rachel has experience working within municipal government and provides support services for Bob Hall & Associates recruitments. She is proficient in Adobe Creative Cloud, Microsoft Office, Google Workspace, and NeoGov.

Recent Recruitments

- City Manager** - Stanton
- City Manager** - Laguna Niguel
- City Manager** - Manteca
- City Manager** - San Bernardino
- City Manager** - Fountain Valley
- City Manager** - Tracy
- City Manager** - Laguna Hills
- City Manager** - San Clemente
- Assistant City Manager** - Costa Mesa
- City Attorney** - Manteca
- Fire Chief** - Morro Bay
- Deputy Fire Chief** - Placentia
- Chief of Police** - Signal Hill
- Chief of Police** - Imperial
- Assistant Manager** - Rancho Santa Fe Association
- Director of Finance** - Paramount
- Director of Finance** - Signal Hill
- CFO** - Laguna Woods Village
- General Services Director** - Laguna Woods Village
- Director of Public Works** - San Clemente
- Director of Public Works** - Signal Hill
- Director of Public Works** - Manteca

Recruiting Process

Below, you will find our proposed recruiting process, schedule, and cost breakdown for your consideration. During the recruitment process, we will require the following specific assistance from the District: a draft job description (we will work with the District to craft language), any other legal descriptions or District language and guidelines; District logo, high resolution photography, review of the brochure and other marketing materials and timely feedback; and logistics coordination with any District staff and our team.



Create Position Profile

The Bob Hall & Associates team will meet with the District to discuss the strategy for the search as well as communication preferences and project timeline. It is at this time that the team will collaborate with the District to determine characteristics of the ideal candidate. Communication and customer service is a priority, as the Bob Hall & Associates team will stay in touch with the District throughout the recruitment keeping them up to date. In the meeting, the search criteria will be determined to help aid the Bob Hall & Associates team in narrowing the search to appropriate candidates based on the specific goals and qualities of the organization.

Outreach and Recruiting

Outreach

Outreach begins with the creation of a job announcement and brochure that will be advertised for the public to see on platforms such as *Public CEO*, *Nevada League of Cities*, *GovernmentJobs.com* and in *Western City Magazine*. We will also utilize social media engagement on LinkedIn, networking with top industry leaders throughout the nation, and personal outreach.

Candidate Identification

Following the creation of the job announcement and advertisement of the position, the Bob Hall & Associates team will actively seek out qualified candidates by tapping into the network of talented prospects both local to California and across the country. Unlike other firms, Bob Hall & Associates focuses on adding a personal touch to the identification process by tailoring the recruiting process to the needs and desires of the organization. Our active recruiting style has proved to increase the number of applications and resumes from potential candidates leading to a deeper evaluation of each individual.

Candidate Assessment

Screening

Every application is promptly acknowledged and carefully examined. Those that most closely fit the criteria indicated by the organization will be subject to a more thorough evaluation. Such evaluation will focus on aspects such as professional experience, size and complexity of current organization as compared to the advertised position.

Initial Research and Interviews

Research will be conducted on top candidates in the form of Internet searches and other public profiles to ensure prospects' values, experiences, and history match the criteria established by the organization. Following research, preliminary interviews will be conducted via phone, video-conferencing, or face-to-face, depending on candidates' location.

Selection and Presentation of Top Candidates

Bob Hall & Associates will manage the selected finalist candidates. Top candidates will be presented to the District for consideration to determine which candidates will be interviewed. The District will be provided with detailed description of work history and other important information about each candidate prior to selection and scheduling of interviews.

Negotiations

The Bob Hall & Associates team is willing and able to support the City in the negotiation process of the selected candidate's compensation package.

Close Out

After the organization has successfully chosen a candidate, the search will be closed out. This includes informing finalist candidates of the status of the search via telephone.

Project Costs

The General Manager recruitment will be complete and comprehensive searches in an effort to present Incline Village General Improvement District with the most capable, talented, candidates available. The all-inclusive fee to perform the General Manager search will be \$30,000. This fee will include advertising, printing, three in-person visits to the District and unlimited virtual meetings with the Board and/or staff. Additional trips to the District will be billed at \$900 per trip.

The fee to conduct each Executive & Director level search will be \$20,500 plus expenses, not to exceed \$23,500. These expenses will include advertising, printing, and travel to the District. Top candidates will be subject to DMV, civil and criminal background, and credit checks. This proposal is good for at least 180 days from August 4, 2023. Should Bob Hall & Associates be selected for multiple Director-level recruitments, we will provide the District with a 10% discount.

Fees will be collected in three installments as follows:

1. Upon Execution of the Agreement – 35% of fee
2. Following Presentation of Candidates – 35% of fee
3. Upon Acceptance of Offer – 30% of fee

Project Timeline

A typical search will be conducted in a 90 to 120-day period from start to finish. Following the final selection, negotiations can take up to two weeks. The proposed schedule includes four to five weeks of active recruitment, which reflects our suggested minimum timeline. However, this can be adjusted if the District would prefer a longer or accelerated process. An exact schedule will be provided once a firm start date has been provided by the District. If an expedited process is preferred, we can reduce the process to about 60 days however we will need to ensure review dates and interviews are scheduled early in the process.



Bob Hall & Associates' Guarantee

The Bob Hall & Associates team guarantees industry-standard services. If within one year following appointment, selected candidate resigns or is terminated for cause, our team will conduct another search free of professional services charges. However, the organization will be expected to pay for incurred costs.

References

Jarad Hildenbrand, City Manager of Laguna Hills

jhildenbrand@lagunahillsca.gov
(949) 707-2610

Patrick Harper, Mayor of Fountain Valley

patrick.harper@fountainvalley.org
(714) 593-4403

Karin Schnaider, Assistant City Manager, Tracy

karin.schnaider@cityoftracy.org
(209) 831-6800

Johanne Thordahl, Human Resources Manager of San Clemente

thordahlj@san-clemente.org
(949) 441-8127

Siobhan Foster, Chief Executive Officer of Laguna Woods Village

siobhan.foster@vmsinc.org
(949) 597-4600

Dominique Albrecht, Association Manager of Rancho Santa Fe Association

dominique@rsfassociation.org
(858) 756-1174



EXECUTIVE RECRUITMENT SERVICES INCLINE VILLAGE GENERAL IMPROVEMENT DISTRICT

Submission date: August 10, 2023

Submitted by:

Koff & Associates
2835 Seventh Street
Berkeley, CA 94710

Frank Rojas

Recruitment Manager
Frank_Rojas@ajg.com

510.495.0448

KoffAssociates.com



Koff & Associates
A Gallagher Company



Koff & Associates
A Gallagher Company

August 10, 2023

Lisa Hoopes
Incline Village GID
893 Southwood Blvd,
Incline Village, NV 89451

Dear Ms. Hoopes,

Thank you for the opportunity to submit our proposal to assist Incline Village General Improvement District with Executive Recruitment services. We are excited about the possibility of developing this partnership and supporting the District with upcoming Executive Recruitment Searches. Koff & Associates (K&A), a Gallagher company, is uniquely qualified based on over 37 years of assisting public agencies with finding and placing candidates dedicated to public service.

Our unique selling proposition lies in K&A's experience supporting public sector clients in California and throughout the USA. Through our investment in modern recruitment technology, we offer forward-thinking services that not only provide advanced extensive sourcing and outreach but allow us to tell the story of each project through easy-to-understand data.

Conducting countless executive search efforts has made K&A an expert in identifying, targeting, recruiting, and successfully placing women and minority candidates in many of our recruitments. Diversity recruiting is an area of focus, and our firm has a vast pool of resources at our fingertips to provide outreach on an industry-wide basis to the public and private sector for qualified candidates nationwide. We pride ourselves on transparency, flexibility, and quality work.

As K&A's Recruitment Manager, I am available to answer questions about this proposal, as well as our team and recruitment services. You can reach me at (510) 495-0448 or Frank.Rojas@ajg.com.

Sincerely,

Frank Rojas
Recruitment Manager



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BUSINESS INFORMATION

Koff & Associates (“K&A”) is a full spectrum, public-sector human resources and recruiting services firm founded by Gail Koff in 1984 and has been assisting cities, counties, special districts, other public agencies, and non-profit organizations.

As of April 30, 2021, we merged with Arthur J. Gallagher and are now officially a Gallagher Division. Our headquarters are in Berkeley, CA, and we have satellite offices in Southern California, the Central Valley, the Sacramento Region, and the Western US Region. GALLAGHER BENEFIT SERVICES, INC. is our legal name. It is a Delaware company, and the FEIN is 36-4291971.

EXPERIENCE AND QUALIFICATIONS

With 37 years of HR experience, Koff & Associates knows public sector employment inside and out. We are familiar with public sector organizational structures, agency missions, operational and budgetary requirements, and staffing expectations. Our team is ready to support you at any level you wish – providing sourcing expertise, full-cycle recruitment at the start of your search through the start date of your newest employee, and everything in between.

We build enduring relationships	K&A provides personal attention to and creates long-term relationships with our clients. Because we care about and understand your organization’s people, culture, leadership, and unique needs, we identify highly qualified candidates to support your goals.
We value strength in diversity	We source top talent reflective of the communities you serve. With our focus on inclusion, networking and partnering with minority-based associations, utilizing bias-reducing tools, and drawing from our own employees’ certification training, we are leaders in public sector Diversity and Inclusion.
We leverage innovative search technology	K&A uses advanced programs and unique sourcing methods to identify candidates which traditional recruiting strategies might have missed. We continuously gather and analyze important data points and are always looking ahead at how we can use information technology to better serve you.

Our long list of clients indicates our firm’s reputation as a quality organization that produces comprehensive, sound, and cost-effective results. K&A is “hands on” and responsive with the ability and expertise to identify the ideal candidate(s) for Incline Village General Improvement District.

K&A uses its vast network to leverage recommendations and referrals of past clients in combination with modern sourcing techniques and technology to build the best candidate pools in the market. We are a team of true recruiters with over 60 years of combined experience. Our work speaks for itself, and our primary goal is to provide professional and technical consulting assistance with integrity, honesty, and a commitment to excellence.



RECENT SUCCESSFUL RECRUITMENTS

The following is a partial list of recent executive recruitments conducted by the Koff & Associates recruitment team and Frank Rojas (some while at a previous firm):

Agency	Title	Year Completed
City of San Bernardino	City Manager, Director of Public Works Director, Director of Human Resources, Deputy Director of Human Resources (Risk), Director of Finance, Director of Animal Services	2023 – 2019
City of Soledad	City Manager	2023
City of East Palo Alto	City Manager, Chief of Police	2023
South Tahoe Public Utilities District	General Manager	2023
City of Vista	Fire Chief	2023
City of West Hollywood	Economic Development Director	2023
City of Pasadena	Director of Library & Information Services, Chief of Police, Controller	2023 – 2022
City of Palm Springs	Fire Chief, City Manager	2023
City of Carson	Finance Director, Public Works Operations Manager, Community Services Director, City Manager, Public Works Director	2023 – 2020
City of Oxnard	Chief Financial Officer, Budget Manager, Public Works Dir., Asst. Public Works Dir. (2), Purchasing Manager, Controller, Communications & Marketing Manager, Assistant City Attorney, Planning & Environmental Manager, Assistant Director of Housing Programs, Environmental Waste Division Manager	2023 – 2017
City of Berkeley	I.T. Director, Deputy Director of Finance, Public Works Director, Deputy City Attorney (2), Director of Health, Housing and Community Services, Operations Manager (2), Accounting Manager	2023 – 2020
East Bay Regional Park District	Chief Information Officer, Chief of Design & Construction, Chief of Interpretive & Recreation Services	2023
City of Salinas	Finance Director, City Manager, Chief of Police, Assistant Finance Dir.	2023 – 2021
City of Ontario	Assistant Community Development Director, Director of Economic Development, Assistant GM Water Utilities	2023 – 2021
City of Millbrae	Community Development Director, Public Works Director, Finance Director	2022 – 2021
West Valley Water District	General Manager	2023
City of Rialto	Director of Community Development, Director of Engineering Services	2023 2022
City of Patterson	Finance Director	2022
Contra Costa Water District	Assistant General Manager (Engineering & Construction), Finance Director	2023 – 2022



City of Signal Hill	City Manager	2022
City of Leavenworth	City Administrator	2022
City of San Jose	Assistant CIO, Chief Information Officer	2022
City of Long Beach	City Treasurer	2022
San Mateo County Transportation Authority	Deputy Director, Transportation Authority; Executive Officer for Civil Rights, Employee & Labor Relations, and Human Resources; District Surveyor, Real Estate	2022 – 2021
City of San Bernardino	Director of Public Works, Chief of Police, Director of Human Resources, Director of Animal Services, Director of Finance, Assistant Director of Human Resources (Risk)	2022 – 2021
County of Riverside	County Counsel, Diversity Equity, and Inclusion Officer, Chief Executive Officer, Animal Services Director	2022 – 2020
East Valley Water District	General Manager/Chief Executive Officer	2022
Stinson Beach Co. Water District	General Manager	2022
City of Oceanside	City Manager	2022
Los Angeles County Vector Control District	General Manager	2022
Metro Parks Tacoma	Chief Financial and Administrative Officer	2022
City of Calexico	City Manager, Chief of Police	2022
CALAFCO	Executive Director	2022
Santa Barbara MTD	Director of Finance and Administration, Director of HR and Risk	2022
City of Lawndale	Director of Finance / City Treasurer	2022
City of Tracy	City Attorney	2022
City of Riverside	Budget Manager	2022
County of Stanislaus	Director of Animal Services	2022
City of Cherry Hills Village	Chief of Police	2022
City of Woodland Park	Chief of Police	2022
City of Oroville	Chief of Police	2022
Humboldt Waste Management Authority	Executive Director	2021
City of Chico	Public Works Director	2021
Tahoe RPA	Director of Human Resources & Organizational Development	2021
County of Santa Clara	Planning Services Manager/Deputy Director	2021
First 5 Alameda County	Human Resources Director	2021



City of San Diego	Director of Transportation	2021
City of Glendale	City Manager	2021
Orange County Social Services Agency	Chief Deputy Director, Division Director (3)	2021 - 2019
City of Carson	Public Works Director, Community Services Director, City Manager	2021 - 2019
City of Colton	Public Works & Utility Services Director	2021
City of Redlands	Director of Municipal Utilities & Engineering, Fire Chief	2021 - 2020
City of Ontario	Economic Development Director	2021
County of Tulare	Director of Human Resources & Development, Director of Information & Communications Technology	2021 -2020
City of Millbrae	Director of Finance, Community Development Director	2020
City of Avondale	Development & Engineering Services Dir., Economic Development Dir.	2020 - 2019
City of Redlands	Fire Chief, Director of Municipal Utilities & Engineering	2020
City of Shafter	City Manager	2020
City of Ontario Municipal Utilities	Assistant General Manager	2020
City of Bell	Director of Community Development	2020
City of Los Angeles	Human Resource & Payroll Project Manager (ERP implementation)	2020
County of San Bernardino	Public Works Director, Human Resources Director, Assistant HR Director, Director of Land Use Services, Regional Parks Director	2020 - 2018
Orange County LAFCO	Assistant Executive Officer	2020
LA Metro	Chief Ethics Officer	2020
Orange County Fire Authority	Purchasing Manager, Fleet Manager, Human Resource Director	2020 - 2017
City of Banning	Director of Administrative Services, Director of Parks and Recreation	2019
City of Santa Ana	City Manager, Parks & Recreation Director	2019
City of Bell Gardens	City Manager	2019
City of Anaheim	Deputy Planning Director, Engineering Manager, Buyer	2020 - 2016
City of Garden Grove	Finance Director, City Manager	2019 - 2016
Desert Healthcare District	Chief Executive Officer	2019
City of San Marino	City Manager	2018
County of San Luis Obispo	County Administrative Officer	2018
County of Imperial	County Executive Officer	2018
City of Avalon	City Manager	2018



PROJECT TEAM

Frank Rojas

Recruitment Manager

Frank brings more than thirty (35) years of recruiting experience from the highly competitive direct placement and contracts labor industries and the corporate environment. He has significant experience placing corporate leaders, executive, professional, and technical staff, including individual contributors for the government sector, non-profits, aerospace, architectural and engineering, information technology, petroleum and chemical, energy, power, civil/structural, transportation, and private industry.

Frank began his career in Contract Labor. Over the next 30+ years, he launched seven start-up offices in several states and locations, providing direct placement and contract support to hundreds of clients in virtually all industries and levels of talent. He continued his career in the non-profit environment, managing and building talent acquisition support during significant growth periods. Having been a speaker at several networking and career coaching venues, Frank believes in utilizing traditional recruiting methodology with social media.

In addition to recently completing recruitments for the City of San Bernardino, County of Riverside, City of Riverside, City of Pasadena, and City of Calexico, recent successful efforts include positions of City Manager, Finance Director, County Executive Officer, Director of Human Resources & Development, City Treasurer, DEI Officer, Chief of Police, and Director-level hires for Information Technology, Social Services, Public Works, Economic Development, Community Services, Animal Services, and Division/Site General Managers.

Frank has been named in the top 1% viewed profiles on LinkedIn and has established a strong client and customer base through trust, effective recruiting, relationship building, and teamwork.

Amanda Kreller

Senior Executive Recruiter

Amanda brings over twenty (20) years of diverse expertise spanning the public and private sectors with a strong focus on executive search, recruitment process outsourcing, and corporate environments. Throughout her career, she has excelled in identifying and connecting outstanding individuals across all organizational levels, ranging from corporate leaders and executives to professionals, technical experts, and individual contributors. Amanda's unwavering dedication to fostering diversity, equity, and inclusion (DE&I) practices is evident in her commitment to sourcing the most exceptional talent for every unique context.

Amanda's educational background includes a Bachelor of Arts (BA) degree in Marketing and Media Studies from San Diego State University, as well as a Master in Education (MEd) in Elementary Education. She is a certified teacher who began her professional journey in the public school system, teaching grades EC-5. Her passion for education extended to serving as a board member for local private schools.

Drawing on her diverse experiences, Amanda smoothly transitioned into recruiting for government agencies such as City of Los Angeles, City of San Diego, City of Long Beach, City of Laguna Beach as well as companies across a range of industries, including biotechnology, environmental, healthcare, technology, legal, finance, human resources, and marketing.



Amanda has honed her skills in providing innovative solutions and support in areas such as organizational development and management, talent engagement and placement, and process improvement strategies. Her multifaceted background equips her with a unique perspective and enables her to offer valuable insights and guidance in various aspects of talent acquisition and organizational growth.

Joshua Boudreaux
Recruiting Supervisor

Joshua has over nine (9) years of public sector Human Resources experience.

He began his public sector journey as a labor representative with the Orange County Employees Association representing employees in grievances, investigations, meet and confers, interactive processes, arbitrations, and negotiations. He transitioned into the HR world at the City of Anaheim where he led classification and compensation projects. At the Orange County Fire Authority, he worked closely with Battalion and Division Chiefs on projects such as classification and compensation, employee relations, and recruitment.

Prior to joining K&A, Joshua served as an Administrative Manager for the County of Orange where he handled employee grievances, conducted investigations, and represented the County on meet and confer items. He served as the President of the Orange County Human Resources Consortium in 2017-2018. Since joining K&A, Joshua partners his classification and compensation experience, marketing skills, and recruitment experience to bring a full-service experience to all clients. He currently manages full-cycle recruitments for California public sector agencies including, cities, counties, and special districts. He provides supervisory oversight for technical, professional, and management recruitments.

Joshua earned his B.S. in Political Science with a concentration in American Politics from the University of California, Los Angeles; his Master's in Public Administration from Chapman University (Brandman); and a Master's Certificate in Human Resources with emphasis in Labor Relations from Cornell University.

Current & Previous Recruitments: City of Seaside – Associate Engineer, Senior Engineer; City of Fairfield – Fire Inspector I/II; Valley Water District – Environmental Planner/Regulatory Specialist, Senior Engineering Technician, Sr. Information Systems Technician; County of Sonoma – Real Estate Manager; Alameda County Water District – Director of Engineering; Dublin San Ramon – Waste Water Treatment Superintendent, Electrician II; City of Long Beach – Jail Administrator, Medical Director, Occupational Health Services Manager; Port of Oakland – Maintenance Manager; City of Gilroy – Fleet Superintendent; Big Bear Lake – Senior Accountant; City of Richmond – Budget Administrator, Accounting Manager; Monterey One Water – SCADA Analyst; City of Richmond – Deputy Director of Community Services: Employment and Training.

Chelsea Freeman
Senior Recruiter

Chelsea's professional qualifications include seven years of experience working in the public sector, mostly with the California State University system. Chelsea also has nine years working in the private sector in manufacturing. In her role as Classification, Compensation and HR Operations Manager, she was responsible for developing and implementing a compensation philosophy for staff and faculty, as well as implementing process improvement efforts within the HR operations. She provided ongoing consultation to Managers



relating to recruiting, best practices in hiring which included Diversity and Inclusion training, and properly classifying and compensating employees.

Chelsea earned her B.A. degree in Communications from Sonoma State University.

Current & Previous Recruitments: City of Fairfield- Senior Information Technology Analyst; Coachella Valley Water District- Associate Civil Engineer, Assistant Civil Engineer; City of Pittsburg- Assistant City Engineer; South Tahoe Public Utility District- Senior Engineer, Associate Engineer; City of Berkeley- Accounting Manager; City of Long Beach-Data Center Officer; City of Richmond- Director of Finance, Coachella Valley Water District- Environmental Services Director.

Peter Smith
Senior Recruiter

Pete brings 18 years of recruiting experience to the table. He has recruited in the public and private sectors in searches spanning nearly every discipline. Examples of his expertise include: executive, director, and professional roles in the public sector; accounting, finance, and treasury; C-Suite positions; private sector director and manager roles generally; and professional roles including legal, accounting/CPA, and healthcare. Further, he has experience in all technical roles, including transportation and public works.

Pete has a Bachelor's of Science in Business Administration with an emphasis in International Business and has started and led several recruiting offices in California.

Pete's success as a recruiter is rooted in values, hard work, and determination. He views his role towards candidates as one as a trusted advisor. It is a matter of helping the candidate understand the realities of the industry and market and explaining in detail what the client/employer is looking for, while maintaining appropriate levels of discretion towards all. Regarding clients, a perspective of complete candor is essential. A consultative approach is required whereby the client is assisted in understanding how their needs intersect with the candidate's perspective. Pete employs state-of-art technology in recruiting, including AI tools, but combines this with traditional, high-touch efforts.

Pete prides himself on universal success in unearthing fantastic candidates. His secret is diligence tempered by constant re-evaluation of metrics and results. There is no such thing as a failed search, only a failure of awareness and creativity.

Ember Plummer
Recruitment Coordinator/Project Support

Ember supports the Koff & Associates team as a Recruiting Coordinator. Their goal is to make meaningful connections and help develop efficient processes to streamline recruiting services. They support the recruiting team in a broad range of administrative needs and in preparing reports and documentation for clients. Ember has a background in IT and academia, and they are excited to apply these skills in the public sector.

Ember earned their B.A. in English Language & Literature and World Literature from Smith College in Northampton, MA.

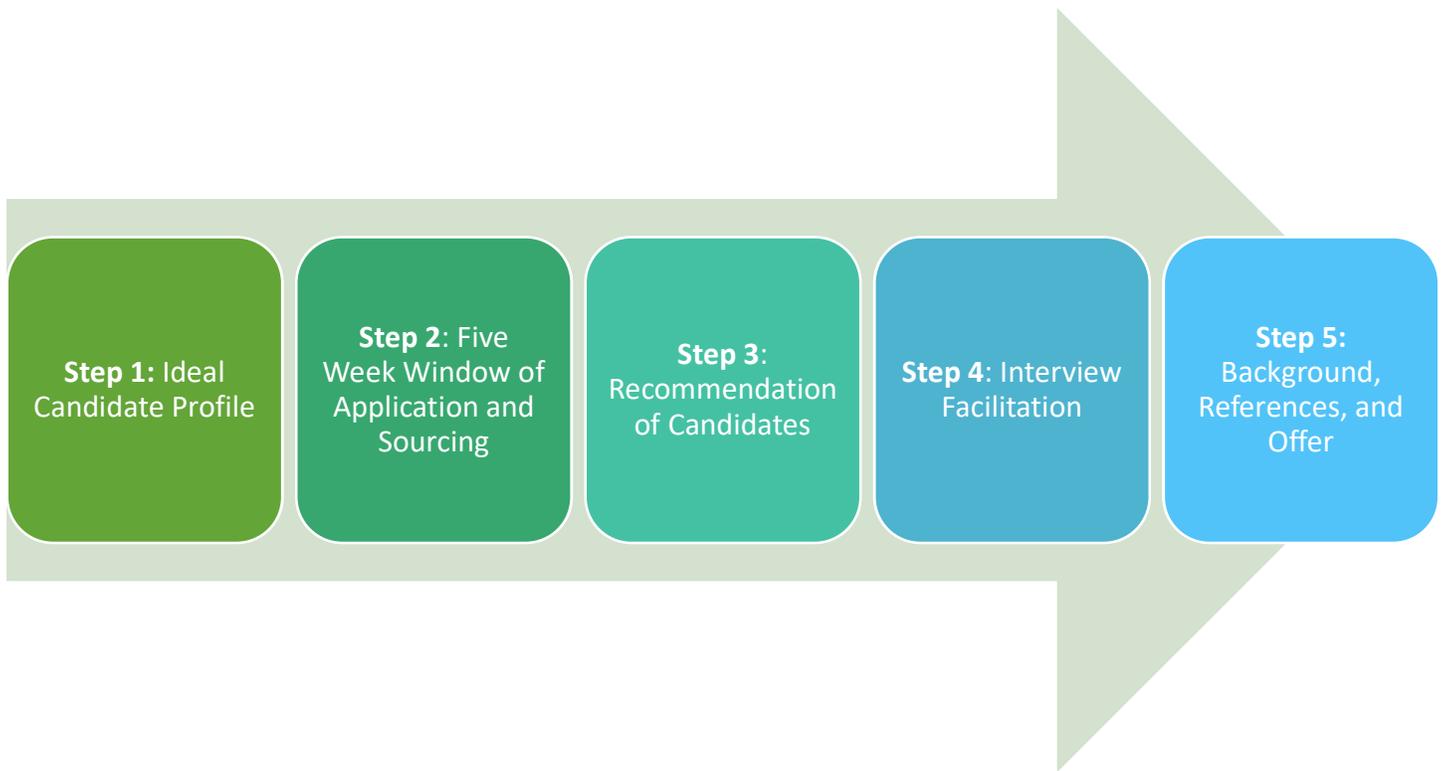


PROJECT APPROACH/METHODOLOGY

Our philosophy ensures thorough, thoughtful, and strategic sourcing, evaluation, selection, and vetting of candidates. We reach out directly to potential candidates, referral sources, professional associations, and user groups, etc. by using business media, outreach emails, general advertising, **and most importantly picking up the phone and actively calling passive applicants**. This strategy also includes focused advertising on websites and in publications specific to women and minority candidates.

K&A will provide weekly progress reports to the District and participate in conference calls and onsite meetings as requested.

We are responsible for ensuring compliance, adhering to, and maintaining all legally mandated documentation throughout the process.





Step 1: Ideal Candidate Profile

Developing the profile for the ideal job candidate for the position is crucial for a successful search process.

We will coordinate with the District in identifying and developing:

- The various organizational needs, vision, mission, goals, strengths, challenges, opportunities, and culture of the organization;
- Position competency requirements, i.e., knowledge, skills, and abilities;
- Personal and professional attributes required of and priorities for the new incumbent;
- Type of working relationship senior leadership desire with the new incumbent;
- Advertising strategies in conjunction with a national and/or regional outreach campaign;
- Compensation levels; and
- Schedule of deliverables from K&A.

After meeting(s) with the District, there will be a consensus of the key qualifications and characteristics of the position and the process, action plan, and timetable to be utilized for the recruitment process.

Brochure Design & Posting

Following the development of the candidate profile, an eye-catching recruitment brochure will be professionally produced in coordination with the District's feedback. The brochure will highlight the strengths of Incline Village General Improvement District and the surrounding community. The brochure will feature the organizational structure and services of the District, its mission and goals, pertinent facts regarding the position, and necessary and desirable candidate qualifications.

Step 2: Five Week Window of Application & Sourcing

K&A can, at the request of the District, facilitate community surveys or community outreach forums to encourage feedback from residents. A report of resident comments will be provided to the District prior to first-round interviews.

Our effort will include a variety of activities designed to build the best available candidate pool. Our techniques and methodologies allow us to source from extensive pools of potential candidates and referral sources.

In coordination with the District, K&A will:

- Identify prospects;
- Provide each potential candidate with access to the recruitment brochure;
- Capture interested candidates in our recruitment project database; and
- Provide representative data to the District, including candidate documents, interview notes, and an outline of the recruitment process.



Step 3: Recommendation of Candidates

K&A will provide the District with a report of the leading candidates to further narrow the pool to the most highly qualified and establish the best organizational fit of each potential finalist. This screening process is specifically designed to assess the personal and professional attributes the District has identified and will focus on each candidate's ability, technical competency, and fit with the District's values, culture, and needs. Our assessment will consist of:

- Experience and qualifications;
- Cultural fit based on our understanding of essential intangibles;
- Clarity of any issues identified in the submitted documents;
- Reasons for position interest,
- The level of commitment to the position and the organization; and
- Other issues, including salary requirements.

Step 4: Interview Facilitation

We will advise and develop interviewing strategies and a menu of questions that will help analyze candidates' qualifications and management/work styles. We will facilitate all necessary communications with the District and candidates to ensure everyone is well prepared.

Interview questions will elicit information about each candidate's technical skill set, experience, leadership skills, adaptability, political astuteness, self-awareness, and other important aspects of the ideal candidate profile.

Questions, evaluation tools, and additional materials will be assembled in intuitive and user-friendly interview packets. We will use evaluation criteria agreed to by the District.

The Project Manager will coordinate interviews, interview schedules, and finalize the process. We will provide oversight during the panel interview process and facilitate a focused discussion with the District at the beginning and conclusion of the interviews to identify the most qualified candidate(s) for final interviews.

Step 5: Background, References, and Offer

K&A provides a thorough and quality reference and background check process for our clients. We start by calling candidates' employment and professional references and having an in-depth discussion, covering their strongest business characteristics, work style, interpersonal skills, and position-specific knowledge. All references will be documented and presented in a concise, user-friendly manner.

Background checks are conducted in coordination with a third-party firm to verify educational degrees and employment records and confirm clear driving records, criminal records, and financial history/credit. Reports can be tailored to clients' needs upon request. Safety for clients and their communities is our priority, so rest assured that we, as well as our background contract firm, meet or exceed relevant reporting requirements.

K&A can facilitate and lead the negotiations of the final terms and conditions of employment, such as the compensation package, benefits, and other perquisites (perks). We will notify all candidates not selected as finalists for the position.



Project Schedule

The following is a typical schedule for conducting recruitment efforts. Search efforts for executive recruitments generally take twelve to fourteen (12-14) weeks to complete, allowing enough time for all steps of the process and client schedules.

Weeks	2	4	6	8	10	12	14
Step 1							
Step 2							
Step 3							
Step 4							
Step 5							

K&A Organizational Diversity Statement

This statement reaffirms our commitment to affirmative action and providing equal employment opportunities to all employees and applicants for employment in accordance with equal opportunity and affirmative action laws.

We affirm our personal and official support of these policies, which provide that K&A is committed to implementing the affirmative action policies, programs, and procedures included in this plan to ensure that employment practices are free from discrimination. Employment practices include but are not limited to the following: hiring, promotion, demotion, transfer, recruitment or recruitment advertising, layoff, disciplinary action, termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. We will provide reasonable accommodation to applicants and employees with disabilities.



REFERENCES

We are proud of our past recruitment work with clients to successfully place candidates to meet their organization’s needs.

Recruitment & Agency	Contact
<p>Oxnard, City of</p> <p>Public Works Director, Asst. Public Works Director (2), Chief Financial Officer, Purchasing Manager, Controller, Communications & Marketing Manager, Assistant City Attorney, Civil/Traffic Engineers</p>	<p>Lisa Baker Assistant Director, Human Resources</p> <p>805.385.7596 lisa.baker@oxnard.org 4300 W. Third Street Oxnard, CA 93030</p>
<p>San Bernardino, City of</p> <p>Director of Community & Economic Development, Chief of Police, Director of Human Resources, Director of Animal Services, Finance Director</p>	<p>Suzie Soren Director of Human Resources</p> <p>909.384.5161 Soren_Su@sbcity.org 290 North 'D' Street San Bernardino, CA 92401</p>
<p>Berkeley, City of</p> <p>Director of Information Technology, Director of Health, Housing, and Community Services, Director of Public Works, Deputy City Attorney(s), Manager of Engineering, Operations Manager(s)</p>	<p>LaTanya Bellow, Deputy City Manager Liam Garland, Public Works Director</p> <p>510.815.1767 lbellow@cityofberkeley.info 510.981.6303 lgarland@cityofberkeley.info 2180 Milvia St Berkeley, CA 94704</p>
<p>Palm Springs, City of</p> <p>Fire Chief, City Manager</p>	<p>Stephanie George Director of Human Resources</p> <p>760.323.8217 Stephanie.George@palmspringsca.gov 3200 E. Tahquitz Canyon Way Palm Springs, CA 92262</p>



PRICING PROPOSAL

Project

- Executive Recruitment Services

Professional Fee and Expenses

- Total not-to-exceed professional fee of \$25,000, which includes all professional services and expenses, including brochure development and design, advertising, printing and shipping, associated consultant travel if required, and background.
- Invoices will be billed monthly in four equal increments of \$6,250.

Note: Expenses do not include candidate travel.

Placement Guarantee

K&A is committed to recommending only the most qualified candidates who meet all the necessary requirements and qualifications and are also a cultural fit for the District. We proactively recruit for each search effort until a successful candidate is placed.

Therefore, we promise to present to the District a selective pool of candidates that met or exceeded our standards during the thorough screening processes and have been identified as ideal matches for the position. Should the District disapprove of all final candidates or should none pass the final interview and reference check process, we will work to find a new slate of candidates at no added cost, with the possible exception of necessary advertising.

In addition, for full recruitments for executive and mid-management positions, should the incumbent leave the position or be terminated from employment within 12 months of hire due to performance issues, we commit to conducting a one-time additional executive search to identify a replacement and only charge related expenses as described in the Pricing Proposal.

Overall, K&A’s retention rate during the first 12 months of hire is robust and has been above 95% over the last 37 years.



OTHER: PROFESSIONAL SERVICES AGREEMENT ACKNOWLEDGEMENT

We will be pleased to sign the District's professional services agreement for recruitment services, however we respectfully request that the District will allow for a period of negotiation of certain terms in the professional services contract related to liability, indemnity, insurance, and other terms. We have found that we have always come to an agreement with all of our clients in the past and appreciate the District's flexibility in reviewing certain terms in a collaborative fashion between our legal counsels.

INSURANCE ACKNOWLEDGEMENT

Gallagher shall at all times during the term of this Agreement and for a period of two (2) years thereafter, obtain and maintain in force the following minimum insurance coverages and limits at its own expense:

- Commercial General Liability (CGL) insurance on an ISO form number CG 00 01 (or equivalent) covering claims for bodily injury, death, personal injury, or property damage occurring or arising out of the performance of this Agreement, including coverage for premises, products, and completed operations, on an occurrence basis, with limits no less than \$2,000,000 per occurrence;
- Workers Compensation insurance with statutory limits, as required by the state in which the work takes place, and Employer's Liability insurance with limits no less than \$1,000,000 per accident for bodily injury or disease. Insurer will be licensed to do business in the state in which the work takes place;
- Automobile Liability insurance on an ISO form number CA 00 01 covering all hired and non-owned automobiles with limit of \$1,000,000 per accident for bodily injury and property damage;
- Umbrella Liability insurance providing excess coverage over all limits and coverages with a limits no less than \$10,000,000 per occurrence or in the aggregate;
- Errors & Omissions Liability insurance, including extended reporting conditions of two (2) years with limits of no less than \$5,000,000 per claim, or \$10,000,000 in the aggregate;
- Cyber Liability, Technology Errors & Omissions, and Network Security & Privacy Liability insurance, including extended reporting conditions of two (2) years with limits no less than \$2,000,000 per claim and in the aggregate, inclusive of defense cost; and
- Crime insurance covering third-party crime and employee dishonesty with limits of no less than \$1,000,000 per claim and in the aggregate.
- All commercial insurance policies shall be written with insurers that have a minimum AM Best rating of no less than A-VI, and licensed to do business in the state of operation. Any cancelled or non-renewed policy will be replaced with no coverage gap, and a Certificate of Insurance evidencing the coverages set forth in this section shall be provided to Client upon request.



SIGNATURE PAGE

We thank you for your consideration of our proposal. We are committed to providing high-quality service and investing in a long-term partnership.

This proposal is valid for ninety (90) days.

Respectfully submitted,

By: KOFF & ASSOCIATES
State of California

Frank Rojas

Date: August 10, 2023

Recruitment Manager



General Manager/ Chief Executive Officer

LEADERSHIP | PARTNERSHIP | STEWARDSHIP

HIGHLAND, CALIFORNIA



East Valley Water District

Formed in 1954 and located in Highland, California in San Bernardino County, East Valley Water District (District) is a world-class, award-winning organization, with a focus not only on providing safe and reliable drinking water but enhancing and preserving the quality of life for the community. The District provides water and wastewater services to residents within a 30.1 square mile area. This includes over 103,000 people within the cities of Highland and San Bernardino, portions of the unincorporated County of San Bernardino, the San Manuel Band of Mission Indians, and Patton State Hospital. The District has been the recipient of several awards including Top Workplace by the Inland News Group, GFOA Distinguished Budget Presentation Award and Outstanding Achievement, and District of Distinction by the Special District Leadership Foundation.

East Valley Water District was formed through a local election of mostly citrus grove farmers, to have water service provided by a public agency. The District is located in the foothills of the San Bernardino Mountains, 65 miles east of Los Angeles in the County of San Bernardino. East Valley Water District currently has 18 programs, which are overseen by various members of the executive management team with a 2021-2022 budget of \$48,536,000.

With a service area just over 30 square-miles, the District has three sources for water, the Santa Ana River (SAR), the Bunker Hill Groundwater Basin, and the State Water Project. The SAR starts with natural springs and snow melt high in the San Bernardino Mountains. Groundwater is drawn from the Bunker Hill Basin, a natural underground storage area made up of soil, sand, and gravel. A portion of the District's water is imported from Northern California through the State Water Project.

The District is responsible for the collection and conveyance of wastewater within the service area. Historically, the wastewater was sent to the City of San Bernardino Municipal Water Department facilities for treatment in accordance with a Joint Powers Agreement. In 2018, East Valley Water District successfully received authorization for reorganization to include wastewater treatment authority. This allows the District to construct and operate facilities to treat wastewater collected from within its service area.

The District is currently finishing construction of the Sterling Natural Resource Center (SNRC) that will treat up to 8 million gallons of wastewater daily for recharge into the Bunker Hill Groundwater Basin. This state-of-the-art facility will create a drought-proof recycled water supply, resulting in hundreds of millions of gallons of water stored for use in the Santa Ana River watershed. The SNRC began operational testing of key systems at the facility and started recruitment efforts of the new program's personnel. With the Sterling Natural Resource Center's Community Ribbon Cutting scheduled for Summer 2022, the District anticipates commissioning the facility to begin treating wastewater by Fall 2022.



Transparency and Governance

The five member Board of Directors are elected at-large and serve 4-year terms. East Valley Water District has established a culture of transparency, fiscal management, and good governance through its dedication to public service. The District has taken steps to make financial reports and other information easily accessible to the public by creating a Transparency Portal. The portal includes access to budget documents, compensation reports, financial audit, and other District related information.

To view the 2021-2022 Adopted Budget, go to: <https://www.eastvalley.org/DocumentCenter/View/2741/2021-22-Adopted-Budget>

District Vision & Core Values

Enhance and preserve the quality of life for our community through innovative leadership and world class public service.

Core Values

- Leadership: Motivating a group of people to act towards achieving a common goal or destination.
- Partnership: Developing relationships between a wide range of groups and individuals through collaboration and shared responsibility.
- Stewardship: Embracing the responsibility of enhancing and protecting resources considered worth caring for and preserving.

To learn more about East Valley Water District, go to: www.eastvalley.org

The Position

Reporting to and hired by a five member Board of Directors, the General Manager/CEO is responsible for executive level activities including planning, directing, managing, and overseeing the services, activities and operations of the District, and is responsible for the overall leadership of the District's 66 dedicated staff members. The General Manager/CEO ensures that services and operations are delivered in an efficient and effective manner while implementing policy decisions made by the Board of Directors and facilitating the development and implementation of the District's goals and objectives.

The General Manager/CEO will be responsible for the daily management and oversight of the District including working closely with the various department and program directors, as well as with other external agencies and stakeholders. Under general policy guidance from the Board of Directors, the General Manager/CEO oversees, reviews, and evaluates the District's 18 programs including, Administration, Engineering, Finance, Operations, Water Reclamation, Human Resources, Customer Service and Community Relations functions; ensuring that services and operations are delivered in an efficient and effective manner, and acting as principal advisor to the Board.

Essential Duties include but are not limited to the following:

- Provide leadership in the implementation of Board policies and the development of strategies, business plans, budgets, programs, procedures, long-range plans and administrative and personnel management for the District.
- Plan and evaluate senior management staff performance.
- Provide leadership and work with staff to develop their skills to the highest potential.
- Hire and retain highly competent, customer-service oriented staff.
- Apply day-to-day management practices which support the District's Vision, Goals and Objectives, and Core Values.
- Direct the development of operating and capital budgets for consideration and adoption by the Board of Directors.
- Represent the District before external organizations, including other water districts/agencies, governmental and regulatory agencies, private entities, professional and community organizations, citizen boards and commissions, media, and general public.

Opportunities and Priorities

- Continue to build and sustain positive working relationships with partnering agencies as a leader in the water industry.
- Stay current on State regulations and requirements and ensure a sustainable and diverse portfolio.
- Be visible and accessible in the community; continue transparency in the District through open communication, newsletters, media interviews, and public engagements.
- With the construction of the SNRC, maintain the solid impact, accountability, and customer service that currently exists; maintain the direction as developed in the Five-Year Workplan.

The Ideal Candidate

The ideal candidate will be a dynamic, visionary, and strategic leader with extensive management and administrative abilities. Excellent communication and interpersonal skills are necessary to build and maintain effective relationships with the Board of Directors, internal staff, partnering agencies, and the public. The successful candidate will be politically astute with the ability to interact with elected officials on matters that impact the District and community. Solid knowledge of water issues and organizational structure, regulatory compliance, business practices and principles, the budget process, and administration are essential. The ideal candidate will be a strategic thinker, who appreciates the need for teamwork and collaboration. East Valley Water District's next General Manager/CEO must be willing and able to manage people and the creative process with inspiration. A successful candidate must show the capacity to multi-task and manage diverse activities, programs, and staff, while leading with diplomacy, inclusive communication, and positive motivational leadership.

The position requires a motivated leader, who is forward thinking, approachable, and committed to excellence. The ideal candidate will understand local, regional, County, and State water issues and trends as well as the Integrated Regional Water Management (IRWM) collaboration and funding process including regional, County, Tribal and State entities.

Key Competencies and Characteristics

- A solid leader and role model with a positive presence who demonstrates initiative, is action-oriented, exercises good judgment, treats others with respect, and is open and approachable.
- An active problem solver who anticipates and responds to problems in a timely manner, develops alternative solutions, and is able to bring resolution to issues quickly, involving others as needed.
- A relationship builder, committed to excellence with a strong customer service ethic and the ability to empower employees, while also holding them accountable.





- An outstanding manager of people who provides guidance and professional support to staff, offers regular feedback to employees, and serves as a mentor in providing training and growth opportunities.
- Excellent at writing clear, concise staff and other reports for presentation in oral or written format to the Board of Directors or other elected bodies.
- A leader who is collaborative and supportive in working with executive leadership, ensuring the organization works toward a common goal.
- A person with the highest ethical standards who commands the trust and respect of peers through conduct of high integrity and professionalism.

Qualifications

Education and experience that provide the required knowledge and abilities would be:

- Graduation from an accredited college or university with a bachelor's degree including major course work in business administration, public administration, civil engineering or related field is required.
- A master's degree or other advanced degree in fields such as public/business administration, legal or engineering is highly desirable.
- Seven years of increasingly responsible experience in a public utility, involving the operation and maintenance of water and wastewater systems, including four years at a management level.

Salary and Benefits

The salary range for this position is \$284,400 - \$324,000, depending on experience and qualifications.

East Valley Water District offers an excellent benefits package that includes:

- CalPERS retirement providing the 2.7% @ 55 retirement formula for classic CalPERS members; new members will be provided the 2% @ 62 retirement formula. The District pays the full contribution to the retirement account.

- Performance Award – 10%
- Automobile Allowance – \$1,500.00 per month
- The District will pay the full monthly premium on the selected medical, dental, and vision benefit provided.
- Supplemental Retirement Account – \$20,000.00 per year
- Supplemental Life Insurance – \$250,000.00

Additional Benefits Include:

- Cost Of Living Adjustment – 3%
- Vacation – 30 days
- Sick Leave – 117 hours
- Administrative Leave – 80 hours
- The District will offer all other benefits provided to its exempt employees in accordance with District standard policies.

Application Process and Recruitment Schedule

The final filing date is Monday, May 16, 2022.

To be considered, please electronically submit your resume, cover letter and a list of five professional references (references will not be contacted in the early stages of the recruitment) to:

<https://koffassociates.com/gm-ceo/>

Resumes should reflect years and months of positions held, as well as size of staff and budgets you have managed. For additional information, please contact:



Frank Rojas
(510) 495-0448

frojas@koffassociates.com

Carlo Zabala
(510) 342-3233

czabala@koffassociates.com

Website: <https://koffassociates.com/>

Resumes will be screened based on the criteria outlined in this brochure. Candidates with the most relevant qualifications will be given preliminary interviews by the executive recruiter. Koff & Associates will report the results to East Valley Water District. The District will then select candidates who will be invited to participate in a formal interview process. Extensive reference and background checks will be completed on the selected candidate.

Korn Ferry Nonprofit Practice



General Manager and Director of Public Works
Search Proposal
August 2023



Dear Erin and Lisa,

Thank you for considering Korn Ferry as your search partner for Incline Village General Improvement District's upcoming General Manager and Director of Public Works searches. This upcoming leadership transition marks a critical moment as you seek to identify a successor to lead Incline Village General Improvement District forward and a leader to oversee the critical function of public works. Your next leaders must be dynamic and possess servant leadership. They must work closely with the board and staff and demonstrate financial stewardship, philanthropic leadership, and the ability to drive the quality and effectiveness of programs. Furthermore, your General Manager must possess the ability to lead through disruption and find creative ways to ensure success in a post pandemic time.

We are confident that we can help you to identify outstanding new leaders who will be additive to your culture, who will celebrate and embrace diversity and inclusion, and who can inspire the team and collaborate well with the board and other constituents to propel the organization forward. As a trusted advisor for major local, regional, and national nonprofit organizations, we understand the landscape of nonprofits and the positive and critical impact they have on communities and the people they serve. Our ability to leverage Korn Ferry's resources and networks both locally and nationwide is unrivaled. We are well equipped to identify a diverse pool of candidates for your consideration who would bring the requisite passion, skills, and experiences necessary to successfully lead Incline Village General Improvement District.

As the leading organizational consulting and executive search firm, Korn Ferry is well positioned to partner with you. Our intentionally inclusive focus, coupled with our deep experience across the nonprofit, public, and corporate sectors, provides us with the expertise and networks that we believe makes our firm uniquely qualified to conduct this search on your behalf. As you plan for your next chapter, please know that we would feel privileged to partner with you.

Kind regards,

Jordan Williams

Managing Consultant | Nonprofit & Education

Jordan.Williams@KornFerry.com



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- I. KORN FERRY OVERVIEW AND QUALIFICATIONS
- II. SEARCH PROCESS AND METHODOLOGY
- III. KORN FERRY LEADERSHIP ASSESSMENT
- IV. DIVERSITY AND INCLUSION
- V. KORN FERRY TEAM
- VI. REPRESENTATIVE ASSIGNMENTS
- VII. PROFESSIONAL FEES AND EXPENSES





Korn Ferry is a global organizational consulting firm, bringing together strategy and talent to drive superior performance for our clients.

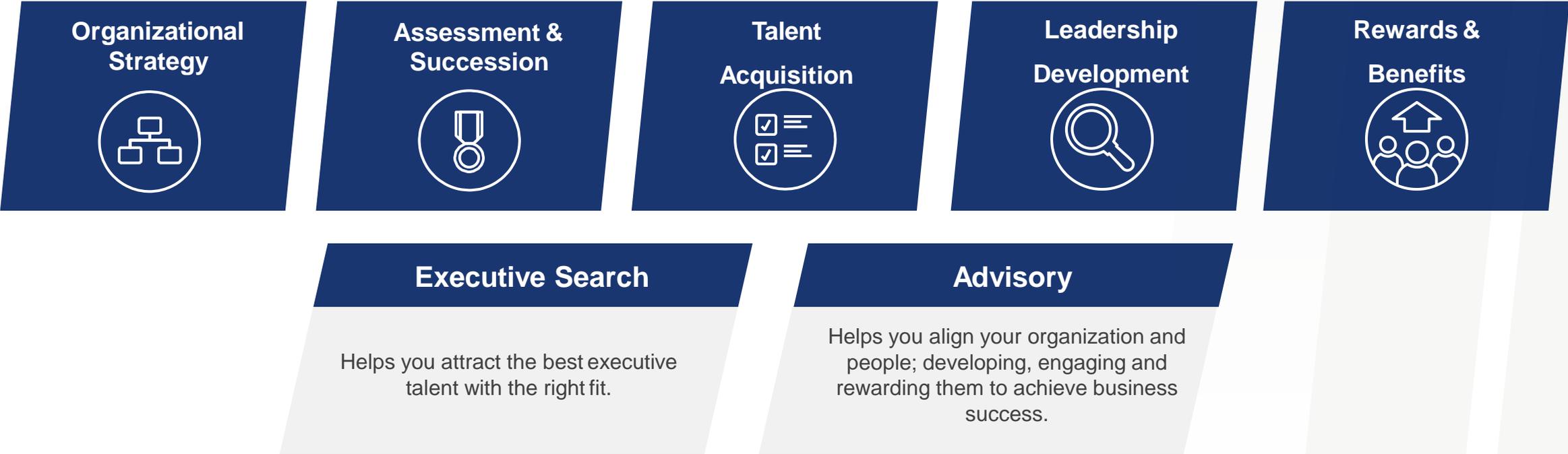
Our purpose is to help people and organizations exceed their potential.



Korn Ferry Overview

Korn Ferry (NYSE:KFY), is a ~\$2B global consulting firm helping organizations achieve the synchronization of strategy & talent.

Headquartered in Los Angeles, California, Korn Ferry help our clients design & execute on their People Strategy programs. Since our inception in 1969, clients have trusted us to help recruit world-class leadership. With nearly 8,600 employees in 110 offices across 52 countries, we assist organizations in attracting, engaging, developing, and retaining their people.





The Nonprofit Practice

With over three decades of executive recruiting and talent development experience, the Nonprofit Practice is creative and aggressive in the market, and holds the capacity to develop best-in-class talent with both traditional and non-traditional backgrounds. Korn Ferry consultants bring decades in executive and emerging leader recruiting, and are distinctly qualified to partner with clients, bringing credibility and an unrivalled combination of deep experience in conducting leadership searches, along with local and national networks and access.

Korn Ferry is proud to be a partner and trusted advisor to organizations across all mission-driven endeavors. Our process follows a disciplined methodology to assure our clients the finest execution of critical steps along the search process. Our extensive experience and network across nonprofits, associations, academia, governments, and the private sector is leveraged to surface and present the highest caliber of candidates, and we diligently seek out diverse talent. Diversity plays a key role in constructing candidate slates that reflect our workplace, marketplace, and the economy.

With our team, you will experience the benefit of working with a hands-on specialty boutique, with the added benefits of significant value-added resources of a large firm to execute a successful search.

OUR SEARCH PROCESS



How We Work

UPFRONT CONSULTING

At the commencement of the assignment, we will spend time with your key stakeholders (board of directors, staff, donors, etc) and ask the right questions to:

- Thoroughly understand expectations of the role and how it is expected to impact the business
- Gain a deeper insight into our client's unique culture to understand the particular nuances necessary to be successful in the role
- Help you define how to maximize this role within the organization, in terms of responsibilities, deliverables and decision making

PARTNERSHIP FROM BEGINNING TO END

Consistent and consultative involvement of Korn Ferry Senior Leaders throughout the process:

- Weekly updates on market feedback and search status
- We assess leadership characteristics against “mission critical” competencies
- Complete candidate referencing
- Active participation in offer negotiation
- Help with on-boarding of successful candidate

Search Process

Kick-Off/Due Diligence

- Kick Off Meeting
- Discuss business strategy and culture
- Confirm target profile and universe
- Establish search process
- Identify search committee
- Establish weekly update calls
- KF4D: Establish assessment criterion / success profile
- Create process for candidate evaluation
- Candidate identification

Confidential Candidate Approach

- Continue candidate Identification & development
- Prepare detailed profiles and evaluation reports
- KF4D: Concurrently, develop success profile and have candidates participate in assessment
- Review profiles
- Begin to set up introductions

Confidential Introductions

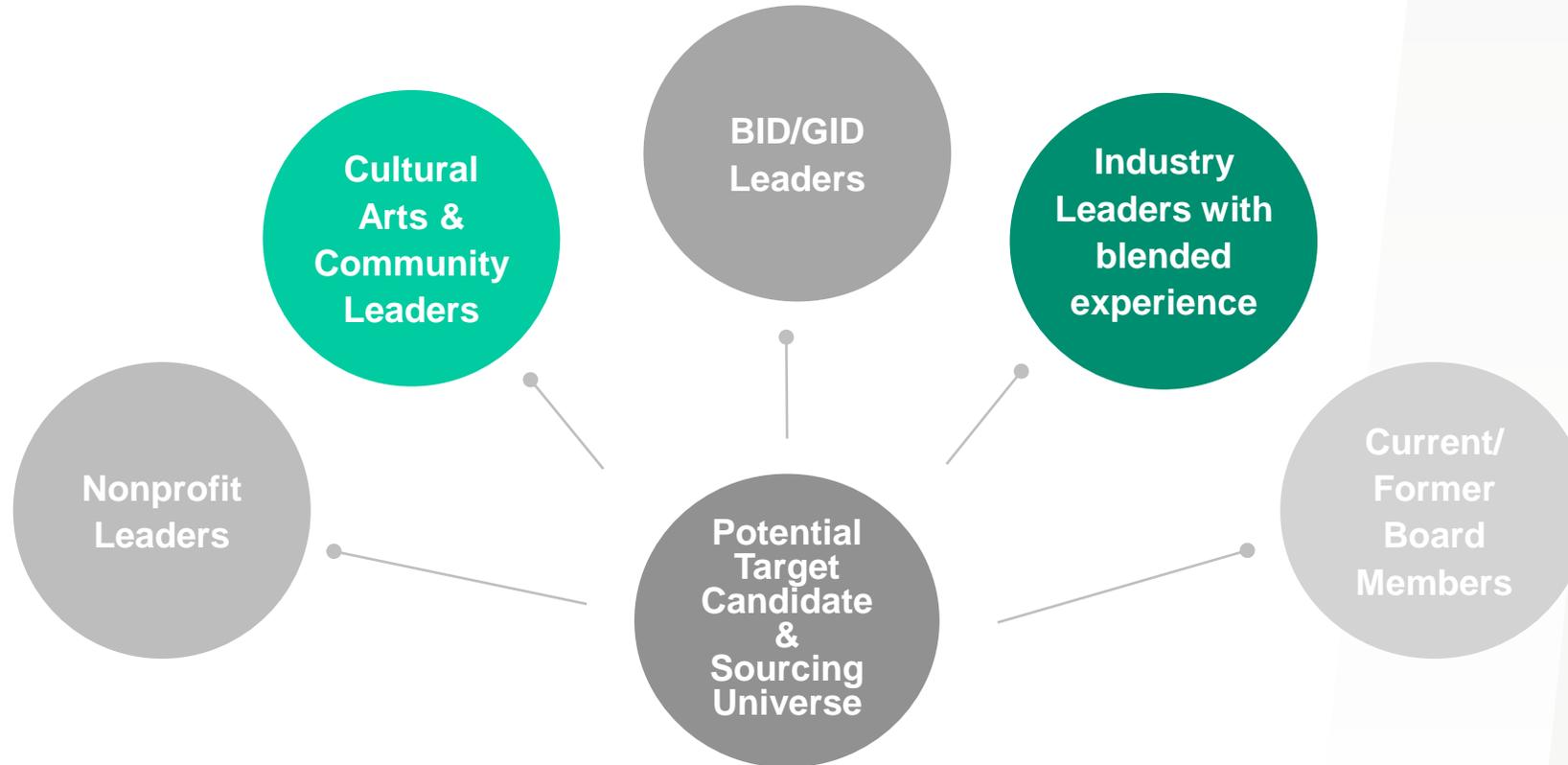
- Facilitate interviews with relevant candidates
- Manage candidates through process to maximize outcome
- KF4D: To discuss results of candidate KF4D / Compare to success profile
- Ask for references, etc.

Offer Stage / On-Boarding

- Conduct reference checks.
- Negotiate salary and benefits.
- Candidate accepts offer
- Initiate onboard process



Sample Search Strategy for Incline Village General Improvement District



Proposed Search Timeline

ITEM	ADD DATES
Korn Ferry and Incline Village General Improvement District Search Committee Launch Meeting.	September
Korn Ferry initiates Unique Client Profile with Search Committee.	September
Korn Ferry conducts discovery conversations with key stakeholders.	September
Korn Ferry and Incline Village General Improvement District Search Committee finalize job specification.	September
Korn Ferry creates search strategy and begins research and candidate development.	October
Korn Ferry conducts candidate calibration call with Incline Village General Improvement District Search Committee.	October
Korn Ferry biweekly client calls commence to include Long List & Short List Reviews.	November
Incline Village General Improvement District Search Committee conduct 1st round interviews. Debrief session to follow.	November
Candidates to progress to 2 nd round interviews complete KF4D Assessment. Review session to follow.	November
Incline Village General Improvement District Search Committee conducts 2nd round interviews. Debrief session to follow to select finalist(s).	December
Incline Village General Improvement District Search Committee conduct Finalist Interviews.	December
Korn Ferry conducts references and education checks for finalist(s).	January
Offer is extended to final candidate.	January
Korn Ferry and Incline Village General Improvement District map out onboarding plan.	January
Incline Village General Improvement District announces selection of new General Manager.	January

SEARCH METHODOLOGY



Search Methodology & Best Practices for Incline Village General Improvement District

Among the best practices for conducting a successful General Manager search for Incline Village General Improvement District are the following:

- Stakeholder engagement early in the process. We would work with the Search Committee to build a target list of stakeholders, including the Search Committee and senior staff. We would facilitate a dialogue with each key group to ensure we learn the following key points:
 1. What are the most critical opportunities and challenges facing Incline Village General Improvement District?
 2. What are the most important experiences, capabilities, and leadership competencies that each stakeholder prefers?
 3. How would you define a successful first year?
- Outreach would be done via ZOOM, telephone interviews, and email surveys. This information would be compiled for the Search Committee and used in the position specification. This data will be highly valuable for the next General Manager as they embark on their new role.
- Alignment of Search Committee on mission-critical leadership competencies, candidate profile and search strategy.
- A communications plan designed to inform key stakeholders throughout the process, while preserving confidentiality of the candidates. Clearly articulating the time commitment for each Search Committee member early in the process for planning purposes and to ensure a high level of engagement.
- An established calendar of key milestone meetings to ensure consistent participation by all Search Committee members, key stakeholders, and senior staff.
- Appropriate engagement of key staff.
- Rigorous evaluation of candidates beyond interviewing, including candidate assessment tools to evaluate leadership competencies, motivational drivers and values fit with Incline Village General Improvement District.
- Meaningful interviews for members of the Search Committee to ensure all dimensions of each candidate are explored.
- Deep referencing and background checks on the finalists.
- An onboarding strategy. Korn Ferry offers onboarding suggestions to ensure a seamless transition for the next Incline Village General Improvement District.

Note: Given the COVID-19 pandemic, Korn Ferry has built an effective Search Committee process leveraging ZOOM technology. We provide an effective solution to managing through these challenging times. We would be pleased to discuss in a follow up conversation.



General Manager Candidate Profile

Candidates should possess a stellar reputation and share a passion for Incline Village General Improvement District's mission.

Experience:

- A proven track record for leading change in a dynamic industry
- An ability to work with diverse stakeholders to build a vision for the future of Incline Village General Improvement District
- A genuine commitment to diversity, equity, and inclusion
- A track record of success in building and leading high functioning teams
- Effective Board leadership experience
- Demonstrated commitment to transparency and open communications
- Persuasive and influential communications skills
- Culture and talent builder
- Global business savvy and cross-cultural communications
- Data and metrics driven
- Digital savvy

Leadership Competencies/Style:

- Leads with integrity, trustworthiness, respect, and fairness
- Strategic mindset and visionary/forward looking
- Inspirational and motivational leadership
- Balances diverse stakeholders
- Effective at aligning execution
- Skilled at building and navigating networks
- Ability to lead through disruption and ambiguity
- Innovative, nimble, and agile
- Consensus builder
- Decisive
- Empowering
- Authentic leadership; strong EQ; humble, with ego in check





OUR PROPIETARY LEADERSHIP ASSESSMENT





KF4D - Four-Dimensional Executive Assessment

- **World-leading:** our most credible tool yet for evaluating talent.
- **Powerful:** puts the range of Korn Ferry expertise at your fingertips and gives you unprecedented levels of control over the assessment process.
- **Convenient:** works on any device and offers all the real-time functionality and convenience of an app.
- **Validated:** predictions are made based on years of research and the results of 4.4 million assessments.
- **Sophisticated:** rich visual representations of assessment results offer you deep insight into every candidate.

“Combining science with the art of search”



KF4D Assessment of Every Candidate

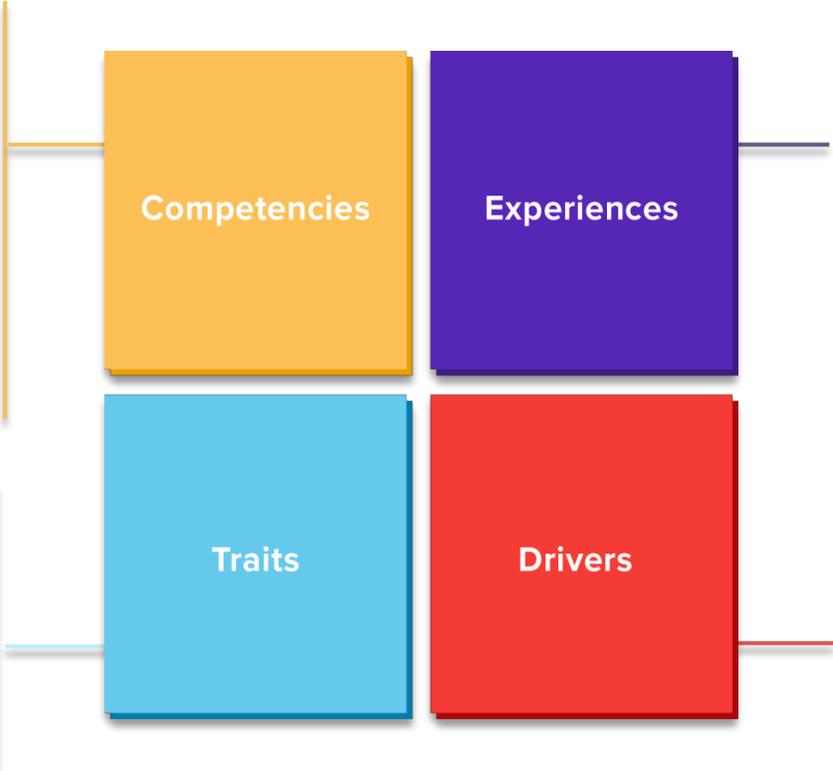
Assessing Fit to Accelerate Performance and Minimize Risk

Competencies include:

- Customer Focus
- Builds Effective Teams
- Creates Vision
- Communicates Effectively
- Instills Trust
- Drives Results
- Build Relationships
- Thinks Strategically
- Attracts/Develops Talent
- Nimble learning
- Engage and Inspire

Traits include:

- Trustworthy
- Risk-taking
- Curiosity
- Affiliation
- Self-Awareness
- Composure
- Confidence
- Sociability
- Focus
- Empathy
- Influence
- Persistence
- Assertiveness
- Tolerance of Ambiguity



Experiences include:

- Strategy Development
- Brand building
- Disruptive Innovation
- Leveraged analytics to drive growth
- Tech and Digital savvy
- Negotiations
- Best in class foundation plus entrepreneurial experience
- Built teams and capability

Drivers include:

- Accomplishment
- Collaboration
- Challenge
- Ambition
- Creativity

The Background

5 Decades of Research

Built from the world’s richest data set: over 7 million executive and professional candidate profiles and 4.4 million assessments

Validated by industry’s top team of industrial psychologists, research scientists, and statisticians



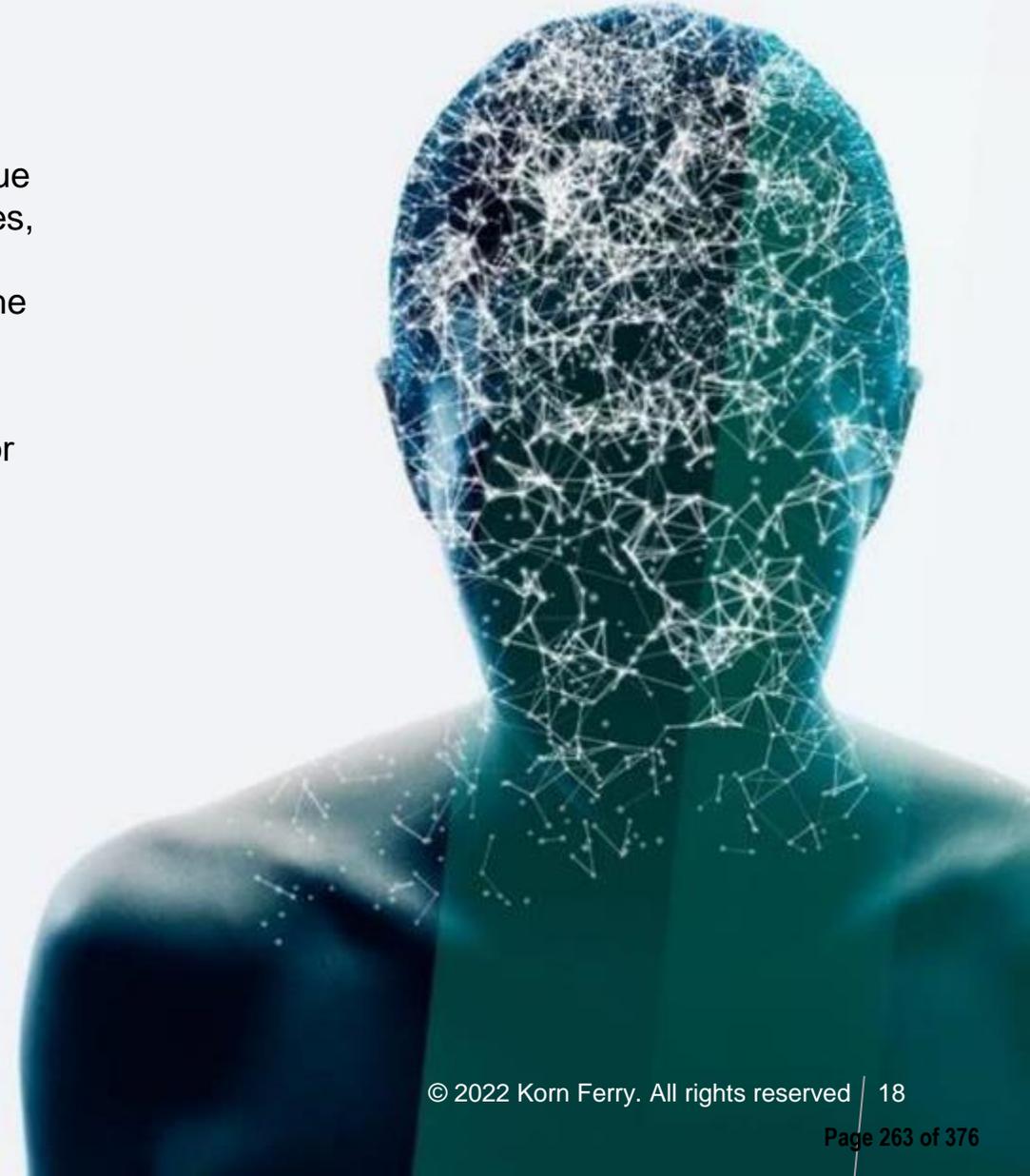
Unique Client Profile (UCP)

Every executive role and organization is distinct, which is why we create a unique client profile (UCP) for each engagement based upon Leadership Competencies, Position Analysis, and Institutional Culture. The purpose of the exercise is to define and prioritize the leadership characteristics that are most important for the role of General Manager, as well as your impression of the culture of the organization.

The resulting report, or “Unique Client Profile” (UCP) will serve as a guideline for how different candidates match the demands of the role and the business context. The report will be used by Korn Ferry when assessing internal or external candidates in succession planning.

In addition to the review of a candidate’s career history, professional interview, and references, each candidate will complete a psychometric assessment of leadership benchmarking their competencies, traits and drivers against the institutional specific UCP and industry averages based upon a Korn Ferry data set of over millions of talent assessments.

This assessment report provides important insights for the Search Committee during their selection process, and provides critical markers for candidate fit, onboarding and long-term development.



Unique Candidate Profile Samples

Audrey Sample

AVP, Operations
Company Confidential

Audrey thrives on complex, potentially unsolvable problem behaviors and experimenting with solutions. Candidates like Audrey like autonomy and relationship-building and may benefit from a network. They approach challenges with a strong level of focus and back down from obstacles and setbacks.

SOCIAL LEADERSHIP
Influence, collaboration, and interpersonal awareness that advances collective goals.

EMPATHY (EM)
Being attuned to others' feelings, motivations and concerns.

COMPOSURE (CP)
The ability to stay calm and poised in stressful, difficult or ambiguous situations.

INFLUENCE (IN)
The ability to motivate and persuade others.

SITUATIONAL SELF-AWARENESS (SS)
The ability to stay attuned to one's own experiences, motivations and reactions in the present moment.

SOCIABILITY (SO)
The natural inclination to engage with and interact with others.

APPLICATION (AP)
A preference for aligning with a larger team or organization toward a common goal.

ABILITY
Adaptability, curiosity, and innovative thinking in conditions of ambiguity and risk.

ADAPTABILITY (AD)
Comfort with unanticipated changes in direction or approach.

CURIOSITY (CU)
The extent to which a person is likely to tackle problems in a novel way, see patterns in complex information and pursue deep understanding.

FOCUS (FO)
Preference for organization, procedure and exactitude.

TOLERANCE OF AMBIGUITY (TA)
Comfort with uncertain, vague, or contradictory information that prevents clear understanding or direction.

RISK-TAKING (RT)
A willingness to take a stand, or take chances based on limited information.

Traits

Candidate Report
January 20, 2016

Audrey Sample

AVP, Operations
Company Confidential

Audrey persuasively shapes the positions of opposing groups, and finds alternate that appeal to differing parties and defuse tension. Candidates like Audrey take and make tough decisions in high-stakes situations, crises, or uncertain conditions.

MOST CRITICAL:	CRITICAL:	LEAST CRITICAL:
ALIGNS EXECUTION	CULTIVATES INNOVATION	ENSURES ACCOUNTABILITY
PERSUADES	COURAGE	HEMISLE LEARNING
STRATEGIC VISION	NAVIGATES NETWORKS	SITUATIONAL ADAPTABILITY
MANAGES CONFLICT	ENGAGES AND INSPIRES	MANAGES AMBIGUITY
BALANCES STAKEHOLDERS	DEVELOPS TALENT	GLOBAL PERSPECTIVE

Legend: Unique Client Profile (Grey), Candidate (Yellow)

ALIGNS EXECUTION
Planning and prioritizing work to meet commitments aligned with organizational goals.

PERSUADES
Using compelling arguments to gain the support and commitment of others.

STRATEGIC VISION
Seeing ahead to future possibilities and translating them into breakthrough strategies.

MANAGES CONFLICT
Handling conflict situations effectively, with a minimum of noise.

BALANCES STAKEHOLDERS
Anticipating and appreciating the varying needs of all parties invested in outcomes.

CULTIVATES INNOVATION
Creating new and better ways for the organization to be successful.

COURAGE
Stepping up to address difficult issues, saying what needs to be said.

NAVIGATES NETWORKS
Effectively building formal and informal relationships inside and outside the organization.

ENGAGES AND INSPIRES
Creating a climate in which people are motivated to do their best to help the organization achieve its objectives.

DEVELOPS TALENT
Developing people to meet both their career goals and the organization's goals.

ENSURES ACCOUNTABILITY
Holding self and others to meeting commitments.

HEMISLE LEARNING
Learns through experimenting with new problem successes and failure fodder.

SITUATIONAL ADAPTABILITY
Adapting approach in real time to match the needs of different situations.

MANAGES AMBIGUITY
Operating effectively when outcomes are not certain or clear.

GLOBAL PERSPECTIVE
Taking a broad view of issues, using a global lens.

Competencies

Candidate Report
January 20, 2016

Audrey Sample

AVP, Operations
Company Confidential

Drivers

Audrey is motivated by working with others as a team, building partnerships, and pursuing joint goals. Audrey is also driven by work that leaves room for pursuing new areas of growth and developing new skills. An ideal environment would be team-oriented, with colleagues who support and challenge each other in the pursuit of common goals. In general, Audrey may be less energized by stability and consistency, and more invigorated when work is unpredictable and ambiguous.

6 DRIVERS:

INTENSITY OF DRIVERS:

Legend: Unique Client Profile (Grey), Candidate (Red)

BALANCE
Motivated to integrate work and life in a sustainable, enjoyable, and meaningful way.

COLLABORATION
A preference for work-related interdependence, group decision making, and pursuing shared goals.

POWER
Motivated to seek influence, recognition and increasing levels of responsibility.

CHALLENGE
Motivated by achievement in the face of tough obstacles.

STRUCTURE
A preference for process-oriented, structured and stable work environments.

INDEPENDENCE
Prefers an entrepreneurial approach and limited organizational constraints.





Drivers
Candidate: **Mary Li**

SIX DRIVERS:



INTENSITY OF DRIVERS:



Mary is motivated by responsibilities and schedule and the opportunity to achieve common goals.

The power of Korn Ferry's recruitment expertise. In the palm of your hands.

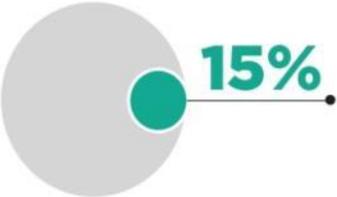
Why it Matters?

Our results are correlated with all key talent variables: engagement, retention, productivity, leadership effectiveness, and leadership potential.



Companies that used Korn Ferry's assessment tool during the executive recruitment process were **eight times more likely to hire an executive who will be promoted within three years** – compared to new hires where Korn Ferry's assessment tool was not used in the recruitment process.

*Korn Ferry Institute study, 2012



Learning agility is a top predictor of high potential. It is estimated that **just 15% of the global workforce are highly agile**. We can help you identify and develop this crucial growth attribute.



Four out of five leaders have serious blind spots about their skills, while two out of five have hidden strengths. We help reveal and understand people's underlying weaknesses while identifying and developing latent strengths.

*Korn Ferry Institute study, 2012



Executives with high levels of learning agility, tolerance for ambiguity, empathy, and social fluidity are **five times more likely to be highly engaged**.



Candidates who are "strongly recommended" based on their Korn Ferry assessment scores are **eight times more likely to be in the top tier of performers** than the bottom tier.

*Korn Ferry Institute study, 2014



Individuals with high learning agility are **promoted twice as fast** as individuals with low learning agility.

*Korn Ferry Institute study, 2014



Korn Ferry found companies with highly agile executives have **25% higher profit margins** than their peer group.

*Korn Ferry Institute study, 2014



DIVERSITY & INCLUSION



Our Diversity Commitment

Commitment: We lean in and are intentionally inclusive. Our diversity efforts reflect Korn Ferry's commitment to equity, diversity, and inclusion, and we ensure that we maintain an active network of contacts in key communities including engagement with professional organizations for women and people of color within the nonprofit sector and other industries. Korn Ferry has invested in a dedicated team within our research function solely focused on diversity. For Incline Village General Improvement District, our process will include employing our vast resources and relationships to ensure a diverse slate of candidates.

Track Record: The Nonprofit Practice of Korn Ferry is proud that 100% of our slates are diverse and over 70% of our placements are women and people of color. We do not consider a pool of candidates to be successful without this commitment.

Mitigating Unconscious Bias:

- Diverse perspectives are solicited during our information gathering phase
- The position description is A) free of language that may be insensitive or implicitly bias and B) inclusive of language that is encouraging to individuals from all backgrounds to apply
- Robust research and proactive outreach to ensure a diverse pool of candidates for consideration
- Prior to an in-person interview, KF conducts a preliminary phone screen based on a rubric of qualifications which enables the team to evaluate facts/relevant experience first and foremost
- Unconscious bias training/review for the Search Committee (optional service)
- Customized interview questions for the Search Committee that prevent gender, racial, cultural, and other forms of bias
- Offer and negotiation phase is fair and equitable
- Onboarding plan is aligned with commitment to equity and inclusion

Our Diversity

25% of our Board, 17% of our Global Operating Committee, 20% of our Global Market MDs & 36% of our Consultants are female

Diversity Awards

“American Council on Education (ACE)” - Network Leadership Award for advancing women into senior level positions within higher education

KF Publications

“Retaining Diverse Talent: Lessons from the Field”
“Providing Leadership in the Search for Diverse Talent”

“Diversity in the Executive Suite: Career Paths and Strategies” (Korn Ferry - in conjunction with Columbia Business School)

“Best Practices for Diversity: Corporate & Candidate Perspectives”

“What Women Want in Business: A Survey of Executives & Entrepreneurs” (Korn Ferry - in conjunction with Columbia Business School)

Diversity, Equity and Inclusion Matter

Korn Ferry is an “Equal Opportunity Employer” and undertakes special efforts to identify diversity candidates for clients. Korn Ferry is committed to best practice in diversity recruiting and as such has:

- A **dedicated Diversity Specialty Team** established in 1998 in the US broadening out across our offices in Latin America and EMEA.
- Access to **Diversity talent networks** through personal memberships and key contacts.
- An **internal Diversity Taskforce** to ensure we are addressing Diversity issues in the most effective ways and are up to speed on current topics.
- Produced a number of **Diversity Publications** and launched two best practice guides to give clients and consultants tips to ensure a more inclusive search process, interview techniques and guidance around diversity candidate attraction and retention.
- Ability to assist with **on-boarding and assimilation** to ensure retention of diverse talent.



THE TEAM





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Jordan Williams Managing Consultant, Nonprofit & Higher Education Practice

Jordan Williams is a Managing Consultant for Korn Ferry's Nonprofit and Higher Education Practice.

In this role Mr. Williams is responsible for assisting and advising clients on building best-in-class teams which align with the mission and vision which of their organization. Jordan has an extensive background in recruitment within the domestic and global non-for-profit and higher education sectors and works closely with the Korn Ferry 4-Dimensional Assessment.

His non-profit experience includes work with Habitat for Humanity, The Green Climate Fund, World Vision International, Poetry Foundation, Jewish Agency for Israel, Hadassah, American College of Radiology, American Academy of Dermatology, Ocean Conservancy, Goodwill, RTW Charitable Foundation, World Bank Group, and Pan American Health Organization.

His recent higher education experience includes work with University of Southern California, Michigan State University, Kenyon College, The University of Arizona, and University of Chicago.

Jordan has worked on various executive and non-executive roles across both sectors including:

Chief Executive, Executive Director, Board of Director, Chief Development Officer, Chief Financial Officer, Chief Communications Officer, Chief Operating Officer, Chief Information Officer, Dean, Chair of Department, Faculty, and other senior leadership team positions.

Prior to joining Korn Ferry, he served as a Senior Recruiter, Associate Executive Search Consultant and Executive Search Consultant for a global executive search firm across the nonprofit and higher education sectors. He was a member of the Training and Development Committee, an employee led working group focusing on the requisite key performance indicators for promotion and the programs for new hire development. Prior to executive search, he spent several years working in cardiovascular and neurosurgical research at the University of Chicago.

Mr. Williams has a BA in French from Wheaton College (IL) and is in the process of completing his MBA with a focus in International Business from University of Wisconsin-Whitewater. Mr. Williams is an accomplished tennis player and spent a year coaching at the collegiate level at Lake Forest College in Illinois. He also volunteers with The Crohn's and Colitis Foundation.





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Jeremy S. Gold Managing Consultant, Corporate Affairs & Legal COE

Jeremy S. Gold is a Managing Consultant in Professional Search in Korn Ferry's Washington D.C. office and a member of the firm's Global Corporate and Government Affairs Center of Expertise, a specialty practice focusing on corporate government relations.

Jeremy provides clients strategies and pathways forward utilizing his extensive political background, strategic insight, and strong ties to leverage his network and reputation to guide clients through the maze of Washington, DC.

Prior to joining Korn Ferry, Jeremy was the President/CEO of The Gold Standard, LLC, a premier full-service political fundraising and advocacy firm, with almost two decades of Political/Non-Profit/Higher Education fundraising experience. Previously, Jeremy was a Senior Associate with PricewaterhouseCoopers Transfer Pricing Consulting Practice in both their New York City and Atlanta offices.

Jeremy received his BBA in Finance from the University of Texas at Austin School of Business.

He is active in his community, coaching and raising money for charitable causes, an avid runner, and a die-hard San Antonio Spurs fan. Jeremy resides in Bethesda, MD with his wife Randi, and their twins, Emma and Jacob.





Julie Palmer Johnson Senior Recruiter, Nonprofit & Higher Education Practice

Julie Palmer Johnson is a Senior Recruiter for Korn Ferry's Nonprofit and Higher Education Practice. In this role, Ms. Johnson is responsible for sourcing and screening candidates for a variety of mid-level and senior level positions. She focuses on building rapport with both clients and candidates to ensure the talent pool aligns with the client's mission and vision for the position.

Ms. Johnson has worked on a variety of leadership searches within the nonprofit and higher education sector including Presidents, Provosts, Vice Presidents, Chief Financial Officers, Deans, Department Chairs, and other senior level positions. Prior to joining Korn Ferry, Ms. Johnson served as an Associate for a boutique executive search firm based in Atlanta, GA. In this role, she conducted research on institutions and candidates, coordinated logistics throughout the search process, assisted with recruitment, and worked on key business development initiatives including preparing proposals.

Before her career in professional search, Ms. Johnson's experience was primarily in Student Affairs and University Advancement - two areas she is still very passionate about. She spent over four years at the Georgia Tech Alumni Association, most recently as Senior Manager of Student & Young Alumni Engagement. During her time at Georgia Tech, she was heavily involved in the Council for the Advancement and Support of Education (CASE), and served as a faculty member for the Student & Young Alumni Engagement conference in 2018 and 2019.

Ms. Johnson is originally from Chicago. She graduated cum laude from George Mason University's Honors Program with a dual Bachelor of Arts degree in Government & International Politics and Interpersonal & Organizational Communication. She earned a Master of Arts in College Student Personnel at Bowling Green State University. Ms. Johnson has always had a passion for college student development and continues to serve in a variety of advisory capacities for her sorority and alma maters.

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REPRESENTATIVE ENGAGEMENTS



Representative Engagements

Client	Position
Harvest Foundation	President
Cumberland Community Improvement District	Executive Director
5 th Avenue Business Improvement District	Chief Executive Officer
5 th Avenue Business Improvement District	Director of Projects
Perimeter Community Improvement Districts	Executive Director
Salt River Project Agricultural Improvement District	Associate General Manager
University of Nebraska	Vice Chancellor, Research and Economic Development
University of North Carolina, Charlotte	Vice Chancellor, Research and Economic Development
Temple Economic Development Corporation	President and Chief Executive Officer
Fairfax County Economic Development Authority	President and Chief Executive Officer
Michigan Economic Development Corporation	Chief Executive Officer
Maryland Economic Development Corporation	Chief Executive Officer
International Economic Development Council	Chief Executive Officer
New York Economic Development Corporation	Chief Financial Officer
Dallas Economic Development Corporation	Chief Executive Officer*
Joliet, Illinois	City Manager*
Winter Springs, Florida	City Manager*
East Palestine, Ohio	City Manager*



PROFESSIONAL FEES



Fees and Expenses

Korn Ferry's fees are non-contingent and consistent with the standards of the profession. Our goal is to achieve total client satisfaction. Every assignment is tailored to meet specific client needs.

Professional & Administrative Fees

- Fees are based on one-third of the candidate's annual base salary and estimated bonus. The professional fee is billed in three monthly installments (at contract, 30 days and 60 days). The first invoice is a non-refundable retainer.
- Korn Ferry is also reimbursed for all database services, search assessment services, research services, and administrative support. These services will be billed as a monthly charge equal to five percent (5%) of the Minimum Professional Fee, for the first three months of the engagement (the "Administrative Service Charge"). **Given our desire to partner with Incline Village General Improvement District, we will bill a monthly charge at four percent (4%) of the Minimum Professional Fee, instead of five percent (5%), for the first three months of the engagement.**
- Adjustments are calculated at the conclusion of the search.

Direct Expenses

- In addition to our professional fees, Korn Ferry is reimbursed for any pre-approved direct out-of-pocket expenses such as candidate travel and lodging and postings. These will be billed on a monthly basis as incurred.

Guarantee

- If our placed candidate should be asked to leave for performance reasons within twelve (12) months of his/her start date, we will conduct a search for a replacement candidate for no additional professional fees, charging only for out-of-pocket expenses incurred in connection with the replacement search. Our service guarantee is predicated on all Korn Ferry invoices having been paid in full within 30 days of the invoice date. The only exceptions to this policy would be for misrepresentation by the company, a material change in the content of the role, or the death or disability of the candidate.



Thank you

