



City of Clearwater, Florida

RFP #15-21

Proposal to provide executive recruiting services

February 11, 2021

Contents

1. LETTER OF TRANSMITTAL.....	1
2. DEMONSTRATED EXPERIENCE OF FIRM AND PROJECT PERSONNEL.....	3
a. PROJECT TEAM	5
b. EXPERIENCE CONDUCTING SIMILAR PROJECTS	14
c. ORGANIZATION OF PROJECT TEAM.....	16
d. ANTICIPATED SUPPORT FROM THE CITY OF CLEARWATER	17
3. PROJECT METHODOLOGY, APPROACH AND TIMELINE.....	18
a. APPROACH TO PERFORMING THE CONTRACTED WORK .	18
b. DETAILED TIMELINE	26
4. REFERENCES	27
5. COST OF CONSULTING SERVICES.....	28
PROFESSIONAL FEE	28
TRIPLE GUARANTEE	29
6. OTHER FORMS	30
EXCEPTIONS/ADDITIONAL MATERIALS/ADDENDA FORM .	31
VENDOR INFORMATION FORM	32
VENDOR CERTIFICATION OF PROPOSAL FORM.....	33
SCRUTINIZED COMPANIES FORM(S) AS REQUIRED	34
E-VERIFY ELIGIBILITY FORM.....	36
W-9 FORM. INCLUDE A CURRENT W-9 FORM.....	37
APPENDIX I: SAMPLE BROCHURE	i
APPENDIX II: SAMPLE EXCERPT OF TTI REPORT	viii

1. Letter of transmittal

February 11, 2021

Ms. Lori Vogel, CPPB
Procurement Manager
City of Clearwater
PO Box 4748
Clearwater, FL 33758-4748

Dear Ms. Vogel;

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

We know that you have options when it comes to selecting a recruitment firm. However, we believe that our unique approach, highly regarded customer service practices, and our record of identifying and recruiting top level executives in similar roles, sets us apart from our competitors. Additionally, we offer the following unique features:

- **Commitment to a successful recruitment is guaranteed:** Baker Tilly will be meticulous and responsive to you - the client - and with prospective applicants using an approach of *“doing whatever it takes to get the job done right!”* Please notice our “Triple Guarantee” referenced in this proposal.
- **Focused strategy for success:** Baker Tilly will conduct a comprehensive, national search to identify exceptional candidates with a proven record of strong leadership and management. Baker Tilly recommends advertising and recruiting nationally, but will also focus on making contact with city management professionals that are currently working in the mid-Atlantic and Southeastern states believing that a regional focus can sometimes bring in candidates more knowledgeable about the nuances of working in Florida and this part of the Country.
- **Talented and experienced recruitment consultants:** Baker Tilly’s recruitment team is outstanding! Baker Tilly has provided executive recruitment and human resources related services to local governments for more than 30 years. Our team has had tremendous success working on recruitments throughout the country and we encourage you to contact our references. The professional experience of our consultants includes three former city managers/administrators, a former human resources director, police chief and a former superintendent of schools. The result – a cohesive and highly experienced consultant team that possesses a thorough and detailed understanding of the leadership, experience, training and certifications required for this position, which ultimately benefits Clearwater with a more targeted and qualified pool of candidates.
- **Video Interviews to screen semi-finalists:** Baker Tilly will use an online video interview process to assist the Mayor and City Council in narrowing down semi-finalists to a smaller group of finalists as part of the all-inclusive fee. This will assist the Mayor and City Council in screening candidates, and could possibly reduce costs by eliminating unnecessary travel expenses for on-site interviews.
- **Leadership assessment of finalists:** Baker Tilly will conduct a strengths assessment and management/leadership style testing, which some may refer to as *“personality and behavioral testing.”* This assessment is completed online by the finalists prior to interviews and determines if a candidate’s management style matches the profile created by the City in an effort to find the “ideal” candidate and determine whether each candidate is a good fit for Clearwater and the community.
- **Comprehensive vetting of finalists (includes social media search):** Baker Tilly’s multiple layered vetting process of screening candidates provides a qualified pool of individuals to consider with not only the skills

and experience desired, but most importantly, a leadership and management style that best fits the City and community. The screening process includes detailed candidate questionnaires, video interviews, leadership and strengths assessment, a comprehensive candidate background review, comprehensive report on each candidate's media and on-line presence, and a comprehensive reference report on all finalists prior to interviews occurring. **(Please Note: Baker Tilly must conduct these background checks for the "Triple Guarantee" to remain in effect).**

- **Commitment to pursue a diverse pool of candidates:** Baker Tilly will take responsibility for ensuring diversity in our candidate pools. In your recruitment, we will use our established networks to make direct and personal contact with prospective minority and female candidates and encourage them to consider an opportunity with the City of Clearwater.
- **Online application and communication system:** We utilize a proprietary online application system exclusively licensed to facilitate talent management for our clients. The system has been designed to customize applicant flow and tracking, allowing for ease of communication with applicants.

Finding candidates with the desired levels of experience and specific knowledge of local government management trends can sometimes be challenging. Of equal importance, we want to ensure that your next City Manager is a "great fit" for the City of Clearwater and the community. Our professional background and many years of experience in recruiting local government managers will provide you valuable insight into finding and selecting the best candidate. We understand the City is looking for a timely, effective, efficient, responsive, well-managed and thorough search process to recruit and identify highly qualified candidates for its next City Manager.

Baker Tilly will work with the City to understand the desired qualities and professional capabilities that are most important to your organization for this recruitment. This information helps us present the City of Clearwater and the vacancy to well-regarded candidates, emphasizing the opportunities for leadership and professional growth as well as presenting the City of Clearwater as a vibrant and thriving community in which to live. Because of the pandemic we are facing, we will work closely with the City Council to develop processes for successfully completing all the tasks and initiatives typically involved in the recruitment process for a city manager. This will be done by creatively working with the technology tools we currently utilize, providing you access to information you need to make decisions, along with the capability to utilize video conferencing to conduct meetings, for interviews of candidates, etc. The proposed project team leader for your recruitment is Art Davis in our Kansas City location. Art will be able to provide on-site support and assistance, if requested, when the time comes to organize final on-site interviews.

We recognize that there is significant competition for experienced local government managers today. For this reason, we work with you to develop a recruitment strategy that includes an aggressive marketing, recruiting and candidate outreach campaign. As you know, a successful recruitment often depends upon the ability to reach successful executives who may not necessarily be in search of new employment opportunities. Thus, we will use existing resources to inform and encourage qualified professionals to apply for this opportunity and believe that these efforts are critical to ensuring the City receives a qualified and diverse candidate pool. We take pride in our ability to provide the City Council with comprehensive information about each candidate we present, expanding beyond applications and resumes, to better understand their professional experience, the leadership and management style they will bring to your organization, and their motivation for pursuing this career opportunity. We also assist you in the preparation of interview questions, interview day scheduling, planning and structuring as needed. This proposal details our approach, expertise, references and pricing for this executive recruitment. We would consider it a professional privilege to provide these services to the City of Clearwater.

Very truly yours,

BAKER TILLY US, LLP



Chuck Rohre, Firm Director

Authorized Representative

M: +1 (214) 608 7477

E: chuck.rohre@bakertilly.com



Art Davis, Director

Project Team Leader

M: +1 (816) 868 7042

E: art.davis@bakertilly.com

2. Demonstrated experience of firm and project personnel

Firm introduction

Baker Tilly is a nationally recognized firm with a long history of service to clients located throughout the country. For more than 85 years, Baker Tilly has understood that our business demands absolute integrity, a belief in the value of trusted relationships and a willingness to collaborate with every client. We will strive to continue to deepen and enhance our relationship with the City as we seek to become your Value Architect™.

Executive recruitment for public and non-profit clients has been a part of Baker Tilly's portfolio of advisory services for more than 30 years. Within Baker Tilly, our executive recruitment team consists of 10 recruitment consultants and project coordination staff available to meet your executive recruitment needs. Each consultant assigned to this recruitment has experience working with cities, counties, special districts and school districts and the many different disciplines that comprise the City of Clearwater organization. Our consultants bring an experienced, participatory and energetic perspective to each engagement; our unique approach and personal touch are reflected in our internal standard to provide outstanding services that exceed your expectations. Since 2015, our combined consultant team has conducted nearly 500 executive searches.

The Baker Tilly project team will collaborate with the City Council and the City's designated staff as your technical advisor to ensure that the recruitment process for your next City Manager is conducted in a thorough and professional manner consistent with "best practices" in the public sector executive recruitment space. Our objective is to generate highly qualified candidates and assist you with the screening and evaluation of these candidates.

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

Why Baker Tilly is ideally suited to serve Clearwater

There are many reasons Baker Tilly has distinguished itself from peers in public sector executive recruitment.

- **We are experienced and passionate about what we do.** Baker Tilly executive recruitment consultants are highly experienced and passionate about local government since all have spent a significant part of their professional careers in senior leadership positions for cities, counties and school districts. The Baker Tilly team has recruited and placed more than 1,400 executive-level positions within cities, counties, school districts and public and not-for-profit organizations since 2000.
- **We are focused on exceeding your expectations.** We believe in local government and want to assist the City of Clearwater organization in building a great team. We

2. Demonstrated experience of firm and project personnel

- want your organization to hire us again based on the success we achieve the first time we work together.
- **We believe that “ethical business practices” are a catalyst for success.** These practices include operating with transparency, responsiveness and sensitivity to the culture of your organization while pursuing an unrelenting commitment to high quality and professional services.
 - **We believe in diversity.** Our corporate core values and work environment reflect our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. We take responsibility for diversity in our organization, our recruitment strategy and our candidate pools. We are corporate members of the National Forum for Black Public Administrators (NFBPA) and the Hispanic Network and are on their National Corporate Advisory Council.
 - **We conduct a timely, high-quality recruitment that is within budget.** For an all-inclusive, not-to-exceed professional fee that includes the cost of professional services by the project team leader, the project support staff and all project related expenses such as advertising, preparation of a recruitment brochure, background, reference and academic verification checks and travel expenses for up to three on-site visits. We work with you to establish a timeline, respond to the City’s needs and to unexpected circumstances that may develop during the course of a recruitment in order to expedite the recruitment, but not at the expense of finding high quality candidates for the City of Clearwater.
 - **We utilize the latest technologies that uniquely sets us apart.** Technology plays an important role in the Baker Tilly executive recruitment process. From our proprietary video interview system and our management/leadership style assessment analysis, to our proprietary online application system, we efficiently manage candidate information and provide the City with unique information about each candidate’s leadership and management style and ability to respond extemporaneously to video questions.
 - **We offer a “Triple Guarantee” that commits Baker Tilly to the City’s success.**
 - We remain focused to assist with your executive recruitment until you make an appointment
 - We guarantee your executive recruitment for 12 months against termination or resignation for any reason – or we come back to fill the City Manager position for no additional professional fee
 - We will not directly solicit any candidates selected under this contract for another position while the candidate is employed with your organization

Benefits to Clearwater

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

- **Comprehensive and structured process:** Our process is comprehensive and seamless, reflecting our years of interaction with local government employers and prospective candidates.
- **Transparency:** Baker Tilly comes to the City without having any preconceived notions or expectations about the Clearwater and prospective candidates. The Baker Tilly team works closely with the City to make sure the process is transparent.
- **Candidate recruitment:** Baker Tilly actively recruits qualified candidates, drawing from our extensive personal and professional connections with capable individuals

2. Demonstrated experience of firm and project personnel

- around the state, region and nation and assuring the City of its access to established managers and rising stars. The ability to widely recruit for prospective candidates is one of the primary benefits of using Baker Tilly.
- **Focused use of the City's time:** Baker Tilly's comprehensive process incorporates the active participation of City Council members at key steps in the process. Our process keeps decision makers fully advised and informed of all aspects of the process without requiring them to expend large amounts of time on the recruitment process or to put aside other pressing issues facing the City.
 - **Minimize staff disruption:** Baker Tilly's search process also minimizes disruptions to City staff, some of whom may have additional duties in this time of transition. Because conducting a thorough recruitment can be time-consuming, Baker Tilly's involvement allows staff to stay focused on their primary and assigned functions.
 - **Thorough evaluation of candidates:** The City of Clearwater seeks a City Manager of sound professional and personal character. Baker Tilly's process includes a thorough evaluation of the final candidates, including detailed information from references and a careful review of background records.

a. Project team

The Baker Tilly project team is designed specifically for the City of Clearwater.

The project team represents experienced professionals who will be working on this City Manager recruitment. Our service team is selected to meet four very specific objectives for the City: 1) it represents the staff who will be directly responsible for your projects; 2) it provides a range of expertise to cover the range of service requirements; 3) it provides a national perspective of experience and institutional knowledge to achieve your future objectives; and 4) it represents the commitment to take personal and professional responsibility for the services and outcomes for the City of Clearwater.

2. Demonstrated experience of firm and project personnel

Art Davis

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



Baker Tilly US, LLP
Director

9229 Ward Parkway
Suite 104
Kansas City, MO 64114-3311
United States

T +1 (816) 912 2036
M +1 (816) 868 7042
art.davis@bakertilly.com
bakertilly.com

Education

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

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

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

Specific experience

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

Industry involvement

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

2. Demonstrated experience of firm and project personnel

Charles A. Rohre

Chuck Rohre, a firm director at Baker Tilly, has more than 35 years of experience managing and consulting in both the private and public sectors.



Baker Tilly US, LLP

Firm Director

2500 Dallas Parkway
Suite 300
Plano, TX 75093
United States

T +1 (214) 466 2436

M +1 (214) 608 7477

chuck.rohre@bakertilly.com

bakertilly.com

Education

Master's Degree, Human Relations and Management
Abilene Christian University (Dallas, Texas)

Bachelor of Science, Career Development
Abilene Christian University (Dallas, Texas)

Chuck is responsible for managing and conducting executive recruitment engagements for the firm to ensure their integrity, timeliness and adherence to budget parameters. He also directs the professional and support staff of the executive recruitment practice to ensure best practices, quality control and customer service goals are met.

Specific experience

- Manager of the executive recruitment practice
- Extensive and successful track record of completed recruitments across the nation, especially in Texas, Colorado, Arizona, and the Midwestern states
- Has led more than 400 recruitment engagements in 27 states for key executives such as city and assistant city managers, police chiefs, fire chiefs, library directors, chief information officers, city/county attorneys, parks & recreation directors, finance directors and public works directors, as well as executive directors of not-for-profit and quasigovernmental organizations
- Conducted management consulting assignments in a number of disciplines including public safety, career development and strategic planning
- Written and presented training in a variety of subject areas including personnel assessment, leadership and management skills, and career development for public sector employees
- Prior to beginning his consulting career, served as police chief and director of public safety for North Texas municipalities with populations ranging from 9,000 to 200,000 plus

Continuing professional education

- Certified Behavior Analyst by TTI, Inc.
- Advanced management training at the Institute for Law Enforcement Administration
- Federal Bureau of Investigation, LEEDS course
- Annual participation in the International City/County Management Association Conference
- Annual participation in state and municipal league conference

Patricia Heminover

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



Baker Tilly US, LLP

Director

380 Jackson Street
Suite 300
Saint Paul, MN 55101
United States

T +1 (651) 223 3058

M +1 (651) 968 7841

patty.heminover@bakertilly.com

bakertilly.com

Education

Master of Education, Administration
Minnesota State University – Mankato

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

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

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

Specific experience

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

Industry involvement

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

Continuing professional education

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

Sharon G. Klumpp

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



Baker Tilly US, LLP **Director**

380 Jackson Street
Suite 300
Saint Paul, MN 55101
United States

T +1 (651) 223 3053

M +1 (651) 270 6856

sharon.klumpp@bakertilly.com

bakertilly.com

Education

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

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

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

Specific experience

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

Industry involvement

- International City/County Management Association (ICMA)

2. Demonstrated experience of firm and project personnel

Anne Lewis

Anne Lewis, a director with Baker Tilly, has worked for local governments for nearly 20 years.



Baker Tilly US, LLP Director

8219 Leesburg Pike
Suite 800
Tysons, VA 22182
United States

T +1 (703) 923 8214

anne.lewis@bakertilly.com
bakertilly.com

Education

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

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

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

Industry involvement

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

Community involvement

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

Continuing professional education

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

2. Demonstrated experience of firm and project personnel

Edward G. Williams, Ph.D.

Edward Williams, a director at Baker Tilly, brings character, competence and expertise to every search.



Baker Tilly US, LLP

Director

2500 Dallas Parkway
Suite 300
Plano, TX 75093
United States

T +1 (214) 842 6478

M +1 (214) 608 6363

edward.williams@bakertilly.com

bakertilly.com

Languages

English
Spanish

Education

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

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

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

Edward has more than 20 years of collective experience in human resources and organizational development at various levels, and across various disciplines including, state and local government, community and educational institutions.

Specific experience

- Human resources executive (municipal and state government)
- Executive recruitment, employee development, benefits administration, strategic planning, Performance management, market compensation studies, workforce planning, recognition programs and process improvement

Industry involvement

- Society for Human Resources (SHRM)
- Institute for Management Studies (IMS), advisory board
- Texas Municipal Human Resources Administration (TMHRA)

Community involvement

- Ft. Bend Habitat for Humanity, president, vice-president, secretary and member, board of (2014-2019)
- AAU basketball coach – middle school boys

Continuing professional education

- Institute for Management Studies - Houston
- International Personnel Management Association

Cecilia Hernández

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



Baker Tilly US, LLP
Senior Recruitment Analyst
2500 Dallas Parkway
Suite 300
Plano, TX 75093
United States

T +1 (214) 736 1606
cecilia.hernandez@bakertilly.com
bakertilly.com

Languages

English
Spanish

Education

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

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

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

Specific experience

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

2. Demonstrated experience of firm and project personnel

Jenelle McDonald

Jenelle McDonald, a senior recruitment analyst at Baker Tilly, has been with the firm since 2016.



Baker Tilly US, LLP
Senior Recruitment Analyst
2500 Dallas Parkway
Suite 300
Plano, TX 75093
United States

T +1 (214) 466 2445
jenelle.mcdonald@bakertilly.com
bakertilly.com

Education
Bachelor of Business Management
Arlington Baptist College (Arlington, Texas)

She assists in the organizational management of executive recruitments. Her responsibilities include conducting research, organizing workflow, coordinating information and resources, and assisting candidates and clients throughout all phases of an executive recruitment. In addition, she also facilitates recruitment brochure design and is responsible for training new executive recruitment support staff.

Prior to joining the Baker Tilly team, Jenelle was an operations manager with a real estate investment firm where she handled accounts payable, marketing, project budgeting, home renovations, tenant communication and investor dividend payments. Jenelle has over fifteen years of experience supporting multiple departments, specifically in branch banking and business development.

2. Demonstrated experience of firm and project personnel

b. Experience conducting similar projects

The following is a list of executive recruitments recently conducted by members of the Baker Tilly team. The recruitments highlighted in **gold** represent projects conducted by Art Davis, the designated Project Team Leader for this executive recruitment.

List of relevant projects: 2016 to present

Year	Client	State	Project	Population
Current	College Park	MD	City Administrator	32,196
Current	Corpus Christi	TX	Assistant City Manager	323,733
Current	Evansville	WI	City Administrator/Finance Director	5,378
Current	Lancaster County	SC	County Administrator	100,000
Current	Long Grove	IL	Village Manager	7,956
Current	Maple Plain	MN	City Administrator	1,807
Current	Moline	IL	City Administrator	41,902
Current	Rockville	MD	Deputy City Manager	70,000
2020	Athens	TX	City Manager	12,797
2020	Boone County	IL	County Administrator	53,513
2020	Eau Claire	WI	City Manager	68,866
2020	Fairmont	MN	City Administrator	10,126
2020	Front Royal	VA	Town Manager	15,239
2020	Kansas City	MO	City Manager	495,943
2020	Lake Ozark	MO	Asst City Admin/Comm Eco Dev Director	1,792
2020	Maple Plain	MN	City Administrator	1,807
2020	Matanuska-Susitna Borough	AK	Borough Manager	108,317
2020	Herington	KS	City Manager	2,300
2020	Missouri City	TX	City Manager	74,705
2020	Moose Lake	MN	City Administrator	2,798
2020	Oakdale	MN	City Administrator	28,083
2020	Rochester	MN	City Administrator	114,011
2020	Scottsbluff	NE	City Manager	14,874
2020	St. Joseph	MO	City Manager	74,959
2019	Beeville	TX	City Manager	12,937
2019	Cloquet	MN	City Administrator	11,938
2019	Hobbs	NM	City Manager	37,764
2019	Lake Lotawana	MO	City Administrator	2,099
2019	Norman	OK	City Manager	122,843
2019	Paris	TX	City Manager	24,800
2019	Park City	KS	City Administrator	10,499
2019	Port Arthur	TX	City Manager	53,937
2019	Willmar	MN	City Administrator	19,628
2018	Addison	TX	City Manager	15,368
2018	Asheville	NC	City Manager	89,121

2. Demonstrated experience of firm and project personnel

List of relevant projects: 2016 to present

Year	Client	State	Project	Population
2018	Lancaster County	SC	Deputy County Administrator	95,000
2018	Ashland	OR	City Administrator	21,636
2018	Avondale	AZ	City Manager	82,881
2018	Belle Plaine	MN	City Administrator	6,838
2018	Billings	MT	City Administrator	110,323
2018	Burnsville	MN	City Manager	61,434
2018	Pinellas County	FL	County Administrator	985,000
2018	Christiansburg	VA	Town Manager	21,533
2018	Grand Rapids	MI	City Manager	210,000
2018	Kingman	AZ	City Manager	29,029
2018	Maricopa	AZ	City Manager	46,903
2018	Middleburg	VA	Town Administrator	828
2018	Mora	MN	City Administrator/Public Utilities GM	3,453
2018	Salina	KS	City Manager	46,994
2018	Shawnee	KS	City Manager	64,323
2018	York	PA	Business Administrator	43,859
2017	Manatee County	FL	County Administrator	345,000
2017	Berthoud	CO	Town Administrator	5,807
2017	Christiansburg	VA	Town Manager	21,533
2017	Cloquet	MN	City Administrator	11,938
2017	Dickinson	TX	City Administrator	19,595
2017	El Dorado	KS	City Manager	12,852
2017	Glenview	IL	Village Manager	45,417
2017	Lake Havasu City	AZ	City Manager	53,743
2017	Littleton	CO	City Manager	44,275
2017	Manassas Park	VA	City Manager	16,149
2017	Morehead City	NC	City Manager	9,203
2017	Mounds View	MN	City Administrator	12,525
2017	Oldsmar	FL	City Manager	13,913
2017	Orono	MN	City Administrator	8,009
2017	Riviera Beach	FL	City Manager	33,263
2017	Rochester	MN	City Manager	110,742
2017	Township of Roxbury	NJ	Township Manager	23,324
2016	Brooklyn Center	MN	Deputy City Manager	31,006
2016	Cary	NC	Town Manager	151,088
2016	Charter Township of Kalamazoo	MI	Township Manager	20,918
2016	Christiansburg	VA	Town Manager	21,533
2016	Circle Pines	MN	City Administrator	4,953
2016	Commerce	TX	City Manager	8,276
2016	Crested Butte	CO	Town Manager	1,519

2. Demonstrated experience of firm and project personnel

List of relevant projects: 2016 to present

Year	Client	State	Project	Population
2016	Deerfield Beach	FL	Assistant City Manager	78,041
2016	Denton	TX	City Manager	123,099
2016	Dumfries	VA	Town Manager	5,168
2016	Fredericksburg	VA	City Manager	28,132
2016	Greensboro	NC	Assistant City Manager	279,639
2016	Hayden	CO	Town Manager	1,801
2016	Jersey Village	TX	City Manager	7,862
2016	Mankato	MN	Deputy City Manager	40,641
2016	Medford	OR	City Manager	77,677
2016	Mooreville	NC	Town Manager	34,887
2016	Moorhead	MN	City Manager	39,398
2016	Moose Lake	MN	City Administrator	2,787
2016	North Branch	MN	City Administrator	10,087
2016	Roswell	NM	City Manager	48,611
2016	Shakopee	MN	Assistant City Administrator	39,167
2016	Virginia	MN	City Administrator	8,661
2016	Warsaw	VA	Town Manager	1,498
2016	Wayzata	MN	City Manager	4,217

c. Organization of project team

The project team will be led by Art Davis with the support of Jenelle McDonald, located in Baker Tilly's Plano, Texas offices. The estimated hours required to successfully complete this project are included in **Section 5 – Cost of Consulting Services**. The proposed fee is a not-to-exceed amount for the client, and assistance from other consultants and support staff on the team will be utilized as needed to ensure a successful recruitment process for the City of Clearwater.

Project team leader

Art Davis, Director

T: +1 (816) 868 7042

E: art.davis@bakertilly.com

Additional project team members

Chuck Rohre, Firm Director

T: +1 (214) 466 2436

E: chuck.rohre@bakertilly.com

Patricia Heminover, Director

T: +1 (651) 223 3058

E: patty.heminover@bakertilly.com

Sharon Klumpp, Director

T: +1 (651) 223 3053

E: sharon.klumpp@bakertilly.com



Our engagement team
has completed more
than 100 successful city
administration searches
since 2015.

2. Demonstrated experience of firm and project personnel

Edward G. Williams, Ph.D., Director

T: +1 (214) 842 6478

E: edward.williams@bakertilly.com

Anne Lewis, Director

T: +1 (703) 923 8214

E: anne.lewis@bakertilly.com

Cecilia Hernández, Senior Recruitment Analyst

T: +1 (214) 736 1606

E: cecilia.hernandez@bakertilly.com

Jenelle McDonald, Senior Recruitment Analyst

T: +1 (214) 466 2445

E: jenelle.mcdonald@bakertilly.com

d. Anticipated support from the City of Clearwater

Baker Tilly requests a commitment by the Mayor and City Council to meet with the recruitment project team leader during the initial and subsequent visits. Baker Tilly would request that the City designate a staff member to serve as our primary point of contact throughout the recruitment. We will ask this person to provide requested information, arrange meetings and serve as the point of contact for progress reporting, provide information needed for each recruitment, such as salary and benefits information, and respond to questions as needed. Also, as part of the interview process, we recommend that department heads be available to meet with finalists and that key personnel be available to assist in providing a tour of the community.

The City would be responsible for organizing on-site interview process, but always with best practice suggestions provided by the recruitment project team leader, if requested. As identified in Section 5 - Cost of Consulting Services the City would be responsible for all travel related expenses incurred by candidates for on-site interviews and would not be the responsibility of Baker Tilly and should be handled directly by the City. This recruitment process is considered a turn-key process to identify qualified and outstanding City Manager candidates for the City of Clearwater. Any other responsibilities relating to both Baker Tilly and the City of Clearwater, such as submittal of invoices, payment terms and all other anticipated interactions are detailed in various sections of this Proposal.

3. Project methodology, approach and timeline

a. Approach to performing the contracted work

The recruitment will be national and inclusive in nature, with a candidate pool of diverse, experienced and talented individuals.

Recruitment solutions during the Covid-19 Pandemic

In response to the COVID-19 Pandemic, the Baker Tilly executive recruitment team leader will work closely with the Clearwater designated point of contact to develop alternative methods to complete all aspects of our established search processes using existing technologies and ensure the overall safety of all involved, which may include virtual or telephonic meetings, interviews, or conversations.

As such, we will creatively collaborate with your organization to provide you with access to critical information you may need to make your hiring decisions. Additionally, we can utilize our capability for video conferencing during meetings, candidate interviews, etc.

When the time arrives for the City Council to interview candidates, we may encourage and support the steps established or recommended by local, state or federal guidelines, public health and medical professionals, including social distancing guidelines and protocols.

Baker Tilly has successfully organized several successful virtual and on-site interview processes following the prescribed social distancing protocols and best practices. As such, Art Davis is able to provide corresponding on-site support and assistance, if requested.

Remote work

For Baker Tilly, the safety of our people is paramount. We are committed to playing our part in containing COVID-19 by practicing responsible social distancing. As of this writing, our firm is directing all professionals work remotely. Because Clearwater expects and deserves tailored, personalized service, we recognize that this policy may cause concern.

Please understand that we are prepared to deliver an exceptional service experience remotely if necessary.

The City's engagement team has various tools enabling them to assist you from any location. Baker Tilly professionals each receive their own laptop and remote access credentials to connect to our internal network from outside the office. When Baker Tilly and the City are not able to meet in person, we have web conferencing software – including Zoom, WebEx and Microsoft Teams – to quickly set up online meetings.

3. Project methodology, approach and timeline

Additionally, we use Huddle, a secure cloud collaboration software, to work together anywhere, anytime and on any device. Huddle provides a platform for the City and Baker Tilly to come together, share files, assign tasks, and track activity in a secure environment.



Using Huddle as a central hub of activity means we all spend less time organizing documents, chasing approvals and searching through email – and more time achieving tangible results. The platform also enables real-time communication, meaning the status of your engagement will always be available. We also use Microsoft Teams, which facilitates easier communication and project management.

Proposed solution to meet Clearwater's needs

The recruitment will be conducted out of our Kansas City, Missouri and Plano, Texas offices. Art Davis will serve as the project team leader. Our proven process includes five major tasks:

1. Recruitment brochure development and advertising

- We schedule and meet with your City's elected officials, appointed management team members and key stakeholders, as requested, to understand your desired needs, strategic directions, overall candidate expectations and to develop a candidate profile

2. Execution of recruitment strategy and identification of quality candidates

- Using the approved profile, we develop a colorful, appealing brochure and embark on a national or regional targeted recruitment campaign
- Additionally, we simultaneously launch a direct applicant outreach campaign targeting eligible prospects identified via our extensive searchable applicant database
- Using our proprietary applicant tracking system, we communicate and update applicants on key processes and corresponding search progress

3. Screening of applications, recommendation of semi-finalists and selection of finalists

- Once we identify the most promising applicants, we ask them to complete our due diligence questionnaire and a candidate questionnaire while the project team conducts a comprehensive web and social media scan to elicit information that could be relevant to employment
- These applicants also complete a recorded, one-way video interview of selected questions designed to secure a different perspective on the applicant's overall qualifications
- We provide you with a Semi-Finalists Report of the top candidates, which includes resumes, cover letters and due diligence questionnaire responses
- Selected finalists complete a management and leadership style and strengths assessment (personality and behavior analysis) to provide us with important information about their styles, temperament, preference, etc.

4. Conducting background checks (criminal, civil, credit and driving record), reference checks and academic verifications

- Background records checks and academic verification
- References

5. Final interview process

- Once your City Council identifies its top 3-5 finalists, we work with you and the finalists to coordinate all aspects of the interview process
- Employment offer – assistance and feedback

3. Project methodology, approach and timeline

Recruitment approach

Task I. Recruitment brochure development and advertising

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

To prepare the recruitment brochure, the project team leader will come on site to meet with the Mayor, City Council and designated staff to discuss the required background, professional experience, and management and leadership characteristics for your City Manager. We meet individually (or collectively depending upon your preference) with the Mayor and City Council to broaden our understanding of the position's leadership and management requirements, current issues, your strategic priorities and your expectations for the City Manager. [See example of a recruitment brochure in [Appendix I.](#)]

Information obtained from these meetings, coupled with our review of the job description and other City documents, is used to prepare a position and candidate profile. The completed profile will be approved by the Mayor and City Council before recruitment begins. The position and candidate profile will be central to our recruitment strategy and outreach to potential candidates.

The project team will also work with the City of Clearwater to develop an advertising and marketing strategy to notify potential candidates about the vacancy and conduct an open recruitment that encourages applications from a talented and diverse pool of candidates. Our team will place ads in appropriate professional publications, websites and local print media, if required, and coordinate with City staff to include information about the search on the City's social media platforms. Additionally, Baker Tilly has a high-traffic website which includes an exclusive location dedicated to encouraging potential candidates to upload their resumes. The aggressive advertising and marketing campaign for top talent will include national, state, regional and local elements as determined during our initial meetings with the City's representatives. Our customized mailing list, selected from our extensive database and contacts collected at appropriate public-sector conferences, will be utilized to further promote the City Manager position.

Advertisements for the City Manager position could be placed with:

Baker Tilly website

City of Clearwater website

International City/County Management Association

National Forum of Black Public Administrators

Careers in Government (careersingovernment.com)

Florida City/County Management Association

Florida League of Cities

Other neighboring state local government management associations as needed

LinkedIn & other social media

Baker Tilly has access to numerous contact lists, websites and listservs specific to local government managers/administrators, universities and their alumni, regional councils of government, and contact lists throughout Florida and nationwide that are focused on local government management professionals

3. Project methodology, approach and timeline

Project milestone	Deliverables	Timeline
Position profile and recruitment brochure development	<ul style="list-style-type: none">– Interviews with the City– Baker Tilly receives information on the City's budgets, organizational charts, images, logos, etc.– Develop draft documents (recruitment brochure, advertisement, marketing letter and timeline)	2 weeks
Approve brochure, commence advertising and distribute marketing letter	<ul style="list-style-type: none">– Brochure sent to the City for final approval– Commence advertising and distribution of recruitment brochure	1 week

Task II. Execution of recruitment strategy and identification of quality candidates

Utilizing the information developed in Task I, Baker Tilly will identify and reach out to individuals who will be outstanding candidates for the position of City Manager. Often, well-qualified candidates are not actively seeking new employment and will not necessarily respond to an advertisement. However, if a potential candidate is presented with the opportunity directly and in the proper manner, he or she may apply. We take pride in our ability to locate highly qualified candidates across the nation based on the professional contacts and relationships we have developed and maintained over many years.

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

During this part of the process the project team will work with the Mayor, City Council and designated staff to reach consensus on the leadership and management style for the ideal candidate. Our research will determine the key competencies, work values and leadership / management style for the City Manager and match the candidates to each attribute.

Each candidate submitting a resume is sent a timely acknowledgement by our team, including an approximate schedule for the recruitment. Throughout the recruitment process, communications are maintained with each candidate regarding information about the recruitment progress and their status in the process. We take pride in the many complimentary comments made by candidates regarding the level of communication and the professional manner in which they are treated during our recruitments.

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

Task III. Screening of applicants and recommendation of semi-finalists

In Task III the project team, under the direction of Art Davis, will screen the candidates against the criteria within the position and candidate profile and develop a list of semi-finalists for recommendation to the Mayor and City Council. We will then narrow the list to

3. Project methodology, approach and timeline

a group of 8-12 semifinalists for review and select finalists on the basis of written candidate questionnaires, early due diligence information, consultant phone interviews and recorded, one-way video interviews.

Another unique aspect of our recruitment process is our use of online recorded interviews for the screening process. Responses are timed and questions are not provided in advance. This tool allows our team to develop a more comprehensive understanding of each candidate's ability to "think on their feet," as well as their personal and professional demeanor. Our team will provide an online link for the Mayor, City Council, as well as others who have input into the hiring decision, allowing them to review and later discuss the recorded responses. This provides your organization with additional candidate assessment tools that can be customized to fit the unique needs of the City.

Project milestone	Deliverables	Timeline
Applicant screening and recommendation of semi-finalists	<ul style="list-style-type: none"> – Baker Tilly compares applications to the approved candidate profile, developed in our searchable applicant database – Most promising applicants are asked to complete candidate questionnaires and provide due diligence information – Media, internet and social media scan for information pertinent to future employment – Top 8-12 candidates identified as semi-finalists – Semi-Finalist Report is prepared, including the brochure, master applicant list, cover letter and resume of candidates to be considered – Baker Tilly and the City review video interviews – Project team leader meets with Mayor and City Council to review recommended semi-finalists – Mayor and City Council selects finalists for on-site interviews – Finalists complete candidate management style assessment, responses are reviewed and interview questions are developed 	2-3 weeks

Task IV. Conducting background checks, reference checks and academic verifications

When the Mayor and City Council approves of a group of finalists for on-site interviews, Baker Tilly will begin the process of conducting reference checks, background checks and academic verifications. A Confidential Reference Report is prepared for each finalist to complete our understanding of his/her management and leadership characteristics and professional work performance.

Background checks will include information from the following areas:

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

3. Project methodology, approach and timeline

To ensure that our quality standards are maintained, we require a minimum of 10-15 business days between the time that you select the finalists for on-site interviews and when we submit the candidate documentation for your final interview process.

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

Task V. Final interview process

Upon completion of Task IV, we will work with the City Council to develop the final interview process, including the use of virtual platforms as requested. We customize the final interview process according to the needs and functions of the position and according to your preference, instructions and directives to include steps that are important to you, our client. As such, the final interview process may include meetings with the department heads, a City tour and the opportunity for a meet and greet, if requested by the City Council. In advance of the interviews, we will provide documentation on each of the finalists which will provide the highlights of their leadership/management profile (Gap Analysis) as well as a summary of the results of the reference checks, background checks and academic verifications. In addition, the Final Report will include guidelines for interviewing the candidates, suggested interview questions and a candidate assessment process for your interview panel(s).

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

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

3. Project methodology, approach and timeline

Our strategy for recruitment of diverse candidates

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

To that end, we take responsibility for diversity in our organization, our recruitment strategy and our candidate pools. In this recruitment, we will use our established networks to make direct and personal contacts with prospective minority and female candidates and encourage them to consider the City of Clearwater's City Manager position. Because of our performance record in presenting a diverse applicant pool, these prospective candidates know they will be fairly considered in the process.

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

Commitment to diversity and inclusion

Diversity, inclusion and belonging is **who we are** rather than simply what we do. We take a holistic approach by embedding the philosophy and practices of diversity, inclusion and belonging into all aspects of our business.

Baker Tilly is a member of [CEO Action for Diversity & Inclusion](#) launched on June 12, 2017 through a steering committee of CEOs focused on making D&I a *business priority and conversation*. It is the largest collection of business leaders openly committed to sharing successful diversity and inclusion initiatives and lessons learned. This corporate exchange provides a unified hub to share successes and challenges.

**CEO ACTION FOR
DIVERSITY & INCLUSION**

As a member, we pledge to:

1. Continue to make our workplaces trusting places to have complex and sometimes difficult, conversations about diversity and inclusion.
2. Implement and expand unconscious bias education.
3. Share best—and unsuccessful—practices.

Growth and Retention of Women (GROW)

Baker Tilly believes that the education and advancement of women creates a more diverse and engaging culture. We believe that this makes our workplace, profession and industry stronger and better through a diverse, engaging and inclusive workplace where exceptional people thrive.

3. Project methodology, approach and timeline

Through our GROW committee, Baker Tilly provides women valuable opportunities to network, share their stories, acquire skills, strengthen professional relationships and advance in their careers. Our commitment to GROW increases the number of women in management positions, enhances the retention of women at all firm levels, creates an environment where women feel empowered, supports our advocacy of advancing women in business, helps us to share knowledge gained through this initiative with clients and creates a workforce that is reflective of our client base.



Supporting Opportunity, Advancement and Recognition for All (SOAR)

Baker Tilly's diversity and inclusion initiative, SOAR, focuses on bringing team members together from different backgrounds to create a more creative, innovative and productive workforce. Simply put, diversity makes each of our professionals unique; inclusion is how that unique team collaborates to achieve common goals. SOAR focuses on ensuring all team members are supported, valued and respected regardless of ethnicity, race, gender, age, physical ability, faith, sexual orientation, education, personality, skills or life experiences.



SOAR was recently named Corporate Partner of the Year by the Washington, D.C. chapter of the National Association of Black Accountants, Inc. (NABA), recognizing our significant achievements in diversity within our organizations and in the industry.

3. Project methodology, approach and timeline

b. Detailed timeline

Below is an estimated timeline for the executive recruitment process. You will be asked during the first on-site meeting to review and approve a Timeline for the recruitment project. It is our intent to conduct the recruitment expeditiously, but not at the expense of finding high-quality candidates for you.

City of Clearwater, Florida Executive Recruitment Preliminary Timeline		
The following timeline represents a preliminary schedule for your executive recruitment based on a commencement date of Thursday, April 1, 2021 . Actual target dates will be developed in consultation with and approved by the Mayor and City Council.		
Project milestone	Deliverables	Target Date
Profile development, advertising and candidate outreach	<ul style="list-style-type: none"> Baker Tilly conducts discussions to develop profile & recruitment brochure; City approves ad placement schedule Baker Tilly sends draft recruitment brochure to the City City returns draft brochure (with edits) Baker Tilly commences recruitment Online data collection begins 	March 30 – May 27
Applicant screening and assessment and recommendation of semi-finalists	<ul style="list-style-type: none"> Baker Tilly commences formal review of applications, the most promising candidates complete questionnaires Candidates complete recorded interview online Baker Tilly completes formal review of applications, sends selected resumes to the City for review Candidates' recorded interviews are presented Baker Tilly meets with the City to recommend semi-finalists; City selects finalists for on-site interviews Finalists complete candidate mgt. style assessment & responses reviewed, interview questions are developed 	May 27 – June 17
Comprehensive background check, academic verifications and reference checks completed for finalists	<ul style="list-style-type: none"> Baker Tilly completes reference checks / background checks/ academic verification on finalists (Min. 10–15 days to conduct backgrounds) Baker Tilly sends documentation for finalists to the City 	June 18 – July 8
On-site Interviews with finalists	<ul style="list-style-type: none"> City conducts on-site interviews finalists 	July 15–16 or July 22-23
Employment offer made / accepted	<ul style="list-style-type: none"> City extends employment offer to selected candidate 	Week of July 26

4. References

Art Davis is the designated project leader for this City Manager recruitment. Feel free to contact any of the individuals listed below to verify the quality of work Baker Tilly and Mr. Davis provides to each client as part of these recently completed executive recruitment projects.

City of Rockville, Maryland (Population 70,000)			
Name	Rob DiSpirito	Title	City Manager
Phone	(727) 638 4140	Email	rdispirito@rockvillemd.gov
Services	Successful recruitments: Deputy City Manager (current), Executive Director of Rockville Economic Development Inc. (REDI) (2018), Police Chief in 2018		
Manatee County, Florida (Population 394,000)			
Name	Cheri Coryea	Title	County Administrator
Phone	(941) 745 3717	Email	Cheri.coryea@mymanatee.org
Services	Successful recruitments: Human Resources Director (2019), County Administrator (2018), Director of Redevelopment & Economic Opportunity (2016)		
Pinellas County, Florida (Population 980,000)			
Name	Ken Welch	Title	Chair, Board of County Commissioners
Phone	(727) 204 0270	Email	kwelch@co.pinellas.fl.us
Services	Successful recruitments: County Administrator (2018), Human Resources Director (2016)		
City of Grand Rapids, MI (Population 210,000)			
Name	Anita Hitchcock	Title	City Attorney
Phone	(616) 828 3775	Email	ahitchco@grand-rapids.mi.us
Services	Successful recruitments: City Manager (2018); Fire Chief (2016)		
City of Gainesville, Florida (Pop 132,249)			
Name	Lisa Jefferson	Title	Human Resources Director
Phone	(352) 393 8750	Email	JeffersonLL@cityofgainesville.org
Services	Successful recruitments: City Auditor (2019), Clerk to the Commission (2017)		
City of Oldsmar, Florida (Population 14,617)			
Name	Eric Seidel	Title	Mayor
Phone	(813) 749 1115	Email	ESeidel@myoldsmar.com
Services	Successful recruitment: City Manager (2017)		

5. Cost of consulting services

The all-inclusive professional fee to conduct the recruitment is provided below.

Professional fee

The all-inclusive professional fee includes the cost of professional services by the project team leader, the project support staff and all project-related expenses such as advertising, preparation of the recruitment brochure, printing, candidate background, reference and academic verification checks and travel expenses for on-site visits. Travel expenses incurred by candidates for on-site interviews with the client are not the responsibility of Baker Tilly and are handled directly by the client organization.

The all-inclusive professional fee will be billed in four installments: 30% of the fee will be billed at the beginning of the recruitment; 30% at the implementation of Phase I; 30% at the implementation of Phase II; and 10% upon acceptance of an offer by the candidate.

All questions regarding the professional fees and project-related expenses should be directed to Art Davis at art.davis@bakertilly.com or via phone at (816) 868 7042.

Phase	Description of professional services	Fee
Phase I	Task 1 Candidate profile development/advertising/marketing (includes one day on site by lead consultant) lead consultant hourly rate – approximately 15 hours research/project management staff hourly rate – approximately 20 hours	\$3,300 \$2,000
	Task 2 Identify quality candidates lead consultant hourly rate – approximately 15 hours research/project management staff hourly rate – approximately 20 hours	\$3,300 \$2,000
Phase II	Task 3 Preliminary screening & initial report to client lead consultant hourly rate – approximately 18 hours research/project management staff hourly rate – approximately 24 hours	\$3,960 \$2,400
	Task 4 Reference checks, background checks, assessments and academic verifications lead consultant hourly rate – approximately 11 hours research/project management staff hourly rate – approximately 18 hours	\$2,420 \$1,800
Phase III	Task 5 Final process/on-site interviews with finalists (includes two days on site by lead consultant) lead consultant hourly rate – approximately 16 hours research/project management staff hourly rate – approximately 18 hours	\$3,520 \$1,800
Conclusion	Acceptance of offer by candidate	
TOTAL ALL-INCLUSIVE PROFESSIONAL FEE		\$26,500

5. Cost of consulting services

Optional services for consideration	Fee
At the City's option, Baker Tilly will conduct a web-based survey to determine key community-wide issues and priorities that could be considered in the selection of a new City Manager. This survey is completed by community leaders, citizens and City employees and would alter the project timeline.	\$2,000
On rare occasions, Baker Tilly is asked to provide additional search services that are not included in this scope of service or to provide more than three on-site visits to the City. Additional work specifically requested by the City which is outside of the scope of this project will be invoiced at the hourly rate of \$220 plus expenses. Baker Tilly will submit a written explanation of the additional services to be provided and the estimated hours that will be required prior to commencing any additional services.	\$220 per hour plus expenses

Triple guarantee

Our Triple Guarantee is defined as:

1. A commitment to remain with the recruitment assignment until you have made an appointment for the fees and tasks quoted in this proposal. If you are unable to finalize selection from the initial group of finalists, Baker Tilly will work to identify a supplemental group until you find a candidate to hire.
2. Your executive recruitment is guaranteed for **12 months** against termination or resignation for any reason. The replacement recruitment will be repeated with no additional professional fee, but will include project-related expenses. Candidates appointed from within your organization do not qualify for this guarantee. This guarantee is subject to further limitations and restrictions of your state laws.
3. Baker Tilly will not directly solicit any candidates selected under this contract for any other position while the candidate is employed with your organization.



6. Other forms

EXCEPTIONS / ADDITIONAL MATERIAL / ADDENDA

Proposers shall indicate any and all exceptions taken to the provisions or specifications in this solicitation document. Exceptions that surface elsewhere and that do not also appear under this section shall be considered invalid and void and of no contractual significance.

Exceptions (mark one):

****Special Note – Any material exceptions taken to the City's Terms and Conditions may render a Proposal non-responsive.**

☐ No exceptions

☒ Exceptions taken (describe--attach additional pages if needed)

We hereby take exception to RFP Terms and Conditions Sections S.13, S.14, S.25, S.26, S.29, and S.36; Detailed Specifications Section titled "Other Insurance Provisions" subsection (a); and Milestones Section 4(a). If selected, we will provide the City with a copy of our standard search engagement terms for review. Notwithstanding anything to the contrary in the RFP, should the City wish to incorporate specific language from the RFP or proceed on the basis of its own format agreement, we will require the ability to propose additional terms and negotiate mutually acceptable revisions to these sections prior to executing a final contract.

Additional Materials submitted (mark one):

☐ No additional materials have been included with this proposal

☒ Additional Materials attached (describe--attach additional pages if needed)

Sample materials included in Appendices.

Acknowledgement of addenda issued for this solicitation:

Prior to submitting a response to this solicitation, it is the vendor's responsibility to confirm if any addenda have been issued.

Addenda Number	Initial to acknowledge receipt
1	SML

Vendor Name Baker Tilly US, LLP

Date: February 11, 2021

VENDOR INFORMATION

Company Legal/Corporate Name: Baker Tilly US, LLP

Doing Business As (if different than above): _____

Address: 2500 Dallas Parkway, Suite 300

City: Plano State: TX Zip: 75093 -

Phone: (214) 608 7477 Fax: (214) 452 1165

E-Mail Address: chuck.rohre@bakertilly.com Website: www.bakertilly.com

DUNS # _____

Remit to Address (if different than above):

Address: PO Box 78975

City: Milwaukee State: WI Zip: 53278-8975

Order from Address (if different from above):

Address: _____

City: _____ State: _____ Zip: _____

Contact for Questions about this proposal:

Name: Chuck Rohre, Firm Director Fax: (214) 452 1165

Phone: (214) 608 7477 E-Mail Address: chuck.rohre@bakertilly.com

Day-to-Day Project Contact (if awarded):

Name: Art Davis, Director Fax: (816) 333 6899

Phone: (816) 868 7042 E-Mail Address: art.davis@bakertilly.com

____ Certified Small Business

Certifying Agency: _____

____ Certified Minority, Woman or Disadvantaged Business Enterprise

Certifying Agency: _____

Provide supporting documentation for your certification, if applicable.

VENDOR CERTIFICATION OF PROPOSAL

By signing and submitting this Proposal, the Vendor certifies that:

- a) It is under no legal prohibition to contract with the City of Clearwater.
- b) It has read, understands, and is in compliance with the specifications, terms and conditions stated herein, as well as its attachments, and any referenced documents.
- c) It has no known, undisclosed conflicts of interest.
- d) The prices offered were independently developed without consultation or collusion with any of the other respondents or potential respondents or any other anti-competitive practices.
- e) No offer of gifts, payments or other consideration were made to any City employee, officer, elected official, or consultant who has or may have had a role in the procurement process for the services and or goods/materials covered by this contract.
- f) It understands the City of Clearwater may copy all parts of this response, including without limitation any documents and/or materials copyrighted by the respondent, for internal use in evaluating respondent's offer, or in response to a public records request under Florida's public records law (F.S. 119) or other applicable law, subpoena, or other judicial process.
- g) Respondent hereby warrants to the City that the respondent and each of its subcontractors ("Subcontractors") will comply with, and are contractually obligated to comply with, all Federal Immigration laws and regulations that relate to their employees.
- h) Respondent certifies that they are not in violation of section 6(j) of the Federal Export Administration Act and not debarred by any Federal or public agency.
- i) It will provide the materials or services specified in compliance with all Federal, State, and Local Statutes and Rules if awarded by the City.
- j) It is current in all obligations due to the City.
- k) It will accept such terms and conditions in a resulting contract if awarded by the City.
- l) The signatory is an officer or duly authorized agent of the respondent with full power and authority to submit binding offers for the goods or services as specified herein.

ACCEPTED AND AGREED TO:

Company Name: Baker Tilly US, LLP

Signature: 

Printed Name: Bonnie Matson

Title: Principal

Date: February 11, 2021

SCRUTINIZED COMPANIES FORMS

SCRUTINIZED COMPANIES AND BUSINESS OPERATIONS WITH CUBA AND SYRIA CERTIFICATION FORM

**IF YOUR BID/PROPOSAL IS \$1,000,000 OR MORE, THIS FORM MUST BE COMPLETED AND
SUBMITTED WITH THE BID/PROPOSAL. FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY
DEEM YOUR SUBMITTAL NONRESPONSIVE.**

The affiant, by virtue of the signature below, certifies that:

1. The vendor, company, individual, principal, subsidiary, affiliate, or owner is aware of the requirements of section 287.135, Florida Statutes, regarding companies on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or engaging in business operations in Cuba and Syria; and
2. The vendor, company, individual, principal, subsidiary, affiliate, or owner is eligible to participate in this solicitation and is not listed on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Sector List, or engaged in business operations in Cuba and Syria; and
3. Business Operations means, for purposes specifically related to Cuba or Syria, engaging in commerce in any form in Cuba or Syria, including, but not limited to, acquiring, developing, maintaining, owning, selling, possessing, leasing or operating equipment, facilities, personnel, products, services, personal property, real property, military equipment, or any other apparatus of business or commerce; and
4. If awarded the Contract (or Agreement), the vendor, company, individual, principal, subsidiary, affiliate, or owner will immediately notify the City of Clearwater in writing, no later than five (5) calendar days after any of its principals are placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Sector List, or engaged in business operations in Cuba and Syria.

Bonnie Matson
Authorized Signature

Bonnie Matson
Printed Name

Principal
Title

Baker Tilly US, LLP
Name of Entity/Corporation

STATE OF MINNESOTA

COUNTY OF RAMSEY

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization on, this 11th day of February, 2021, by Bonnie Matson (name of person whose signature is being notarized) as the Principal (title) of Baker Tilly US, LLP (name of corporation/entity), personally known X, or produced _____ (type of identification) as identification, and who did/did not take an oath.



Maureen D Fuller
Notary Public

Maureen D Fuller
Printed Name

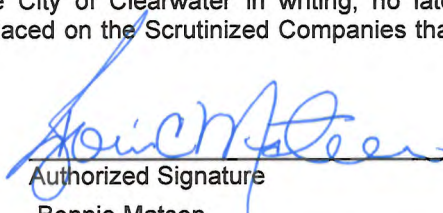
My Commission Expires: 1/31/2025
NOTARY SEAL ABOVE

SCRUTINIZED COMPANIES FORMS

SCRUTINIZED COMPANIES THAT BOYCOTT ISRAEL LIST CERTIFICATION FORM
THIS FORM MUST BE COMPLETED AND SUBMITTED WITH THE BID/PROPOSAL.
FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY DEEM YOUR SUBMITTAL
NONRESPONSIVE.

The affiant, by virtue of the signature below, certifies that:

1. The vendor, company, individual, principal, subsidiary, affiliate, or owner is aware of the requirements of section 287.135, Florida Statutes, regarding companies on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel; and
2. The vendor, company, individual, principal, subsidiary, affiliate, or owner is eligible to participate in this solicitation and is not listed on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel; and
3. "Boycott Israel" or "boycott of Israel" means refusing to deal, terminating business activities, or taking other actions to limit commercial relations with Israel, or persons or entities doing business in Israel or in Israeli-controlled territories, in a discriminatory manner. A statement by a company that it is participating in a boycott of Israel, or that it has initiated a boycott in response to a request for a boycott of Israel or in compliance with, or in furtherance of, calls for a boycott of Israel, may be considered as evidence that a company is participating in a boycott of Israel; and
4. If awarded the Contract (or Agreement), the vendor, company, individual, principal, subsidiary, affiliate, or owner will immediately notify the City of Clearwater in writing, no later than five (5) calendar days after any of its principals are placed on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel.


Authorized Signature

Bonnie Matson

Printed Name

Principal

Title

Baker Tilly US, LLP

Name of Entity/Corporation

STATE OF MINNESOTA

COUNTY OF RAMSEY

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization on, this 11th day of February, 2021, by Bonnie Matson (name of person whose signature is being notarized) as the Principal (title) of Baker Tilly US, LLP (name of corporation/entity), personally known x, or produced _____ (type of identification) as identification, and who did/did not take and oath.




Notary Public

Maureen Fuller
Printed Name

My Commission Expires: 1/31/2025
NOTARY SEAL ABOVE

E-VERIFY ELIGIBILITY FORM

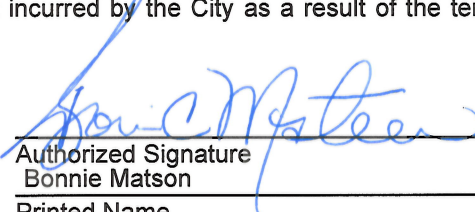
VERIFICATION OF EMPLOYMENT ELIGIBILITY FORM

PER FLORIDA STATUTE 448.095, CONTRACTORS AND SUBCONTRACTORS MUST REGISTER WITH AND USE THE E-VERIFY SYSTEM TO VERIFY THE WORK AUTHORIZATION STATUS OF ALL NEWLY HIRED EMPLOYEES.

THIS FORM MUST BE COMPLETED AND SUBMITTED WITH THE BID/PROPOSAL. FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY DEEM YOUR SUBMITTAL NONRESPONSIVE.

The affiant, by virtue of the signature below, certifies that:

1. The Contractor and its Subcontractors are aware of the requirements of Florida Statute 448.095.
2. The Contractor and its Subcontractors are registered with and using the E-Verify system to verify the work authorization status of newly hired employees.
3. The Contractor will not enter into a contract with any Subcontractor unless each party to the contract registers with and uses the E-Verify system.
4. The Subcontractor will provide the Contractor with an affidavit stating that the Subcontractor does not employ, contract with, or subcontract with unauthorized alien.
5. The Contractor must maintain a copy of such affidavit.
6. The City may terminate this Contract on the good faith belief that the Contractor or its Subcontractors knowingly violated Florida Statutes 448.09(1) or 448.095(2)(c).
7. If this Contract is terminated pursuant to Florida Statute 448.095(2)(c), the Contractor may not be awarded a public contract for at least 1 year after the date on which this Contract was terminated.
8. The Contractor is liable for any additional cost incurred by the City as a result of the termination of this Contract.


Authorized Signature

Bonnie Matson

Printed Name

Principal

Title

Baker Tilly US, LLP

Name of Entity/Corporation

STATE OF MINNESOTA

COUNTY OF RAMSEY

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization on, this 11th day of February, 20 2021, by

Bonnie Matson (name of person whose signature is being notarized) as the

Principal (title) of Baker Tilly US, LLP (name of

corporation/entity), personally known ☒ or produced (type of

identification ☒ and who did/did not take an oath




Notary Public

Maureen D Fuller
Printed Name

My Commission Expires: 1/31/2025
NOTARY SEAL ABOVE

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-				-	
or									
Employer identification number									
				-					

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ►	Date ►
-----------	----------------------------	--------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Appendix I: sample brochure



PINELLAS COUNTY, FLORIDA *IS SEEKING A* COUNTY ADMINISTRATOR



THE COMMUNITY

Pinellas County, home to some of the most beautiful beaches in the country, is a peninsula at the midpoint of the west coast of Florida, bordered by the Gulf of Mexico on the west and by Tampa Bay on the east. While it is the second smallest county in land area, it is the most densely populated county in the state with a permanent population of over 970,637. More than 287,000 residents currently live in unincorporated areas that exceed more than one-third of Pinellas' total land mass. Pinellas is well connected with regional access provided via Interstate 275, two international airports, and the largest port in Florida. There are 24 incorporated municipalities, including St. Petersburg, with a population of 249,000+, followed by the county seat, Clearwater with nearly 110,000 residents. Although the area is a world class tourist destination, Pinellas has the second largest base of manufacturing employment in Florida and a diverse business climate with significant existing and targeted industry clusters in aviation/aerospace; defense/national security; medical technologies; financial services; and information technology. Notable employers include: Home Shopping Network (HSN), Nielsen Media Research, Jabil Circuit, Raymond James Financial, Tech Data, Honeywell, Raytheon, Lockheed-Martin, ConMed Linvatec, TransAmerica and Bausch & Lomb.

Professional sports fans have Major League Baseball's Tampa Bay Rays, the National Football League's Tampa Bay Buccaneers, the National Hockey League's 2004 Stanley Cup Champion Tampa Bay Lightning, and the Tampa Bay Rowdies, an American professional soccer team of the United Soccer League, from which to choose. The area is also known as baseball's spring training capital and is home to the Philadelphia Phillies and Toronto Blue Jays, with nine teams training within an hour's drive. There are numerous cultural venues to attract residents and visitors to world class museums, symphony performances, Broadway shows, rock concerts, and ballet and art festivals. The Mahaffey Theater - The Duke Energy Center for the Arts features a visual and performing arts center in St. Petersburg, and the Salvador Dali Museum is home of the largest collection of Dali's works outside Europe.





COUNTY ORGANIZATION

Pinellas County is a Charter County of the State of Florida providing a full range of government services. A variety of traditional municipal-type services are provided to the unincorporated areas of the County within the Municipal Services Taxing District. The Board of County Commissioners is the legislative body for Pinellas County. Three Commissioners are elected at large but live in specific districts; four commissioners are elected from single-member districts. The Constitutional Officers of the County are the Clerk of the Circuit Court, Property Appraiser, Sheriff, Supervisor of Elections and Tax Collector.

Pinellas County's Unified Personnel System (UPS) was established in 1975 by a special act of the Florida Legislature. The UPS is composed of 11 different members or "Appointing Authorities" and has over 3000 employees with more than 600 job classifications. The Sheriff's Department is no longer included among the Appointing Authorities. The UPS is operated by a Personnel Board consisting of seven members, each serving a two-year term. The Director of Human Resources is appointed by and serves at the discretion of the UPS Board.

In FY2018, Pinellas County operations - including the Sheriff, are supported by a combined funds budget of \$2.2 billion, providing a full range of traditional county and municipal-type services. Each Appointing Authority oversees the management and supervision of functions under their areas of responsibility. The Board of County Commissioners appoints a County Administrator who is responsible for management and supervision of all functions and personnel under the Board of County Commissioners.

THE COMMUNITY (CONTINUED...)

Clearwater's Ruth Eckerd Hall: Richard Baumgardner Center for the Performing Arts offers a wide array of cultural activities. There are rich offerings at county and community parks including art shows, open air concerts and Clearwater's Jazz Holiday, known as one of the South's premier jazz festivals. A host of shows and activities for all ages are available at the local community theaters, professional theaters and museums. Pinellas County is also home to the Clearwater Marine Aquarium, the Valspar PGA Championship, and the Firestone Grand Prix of St. Petersburg.

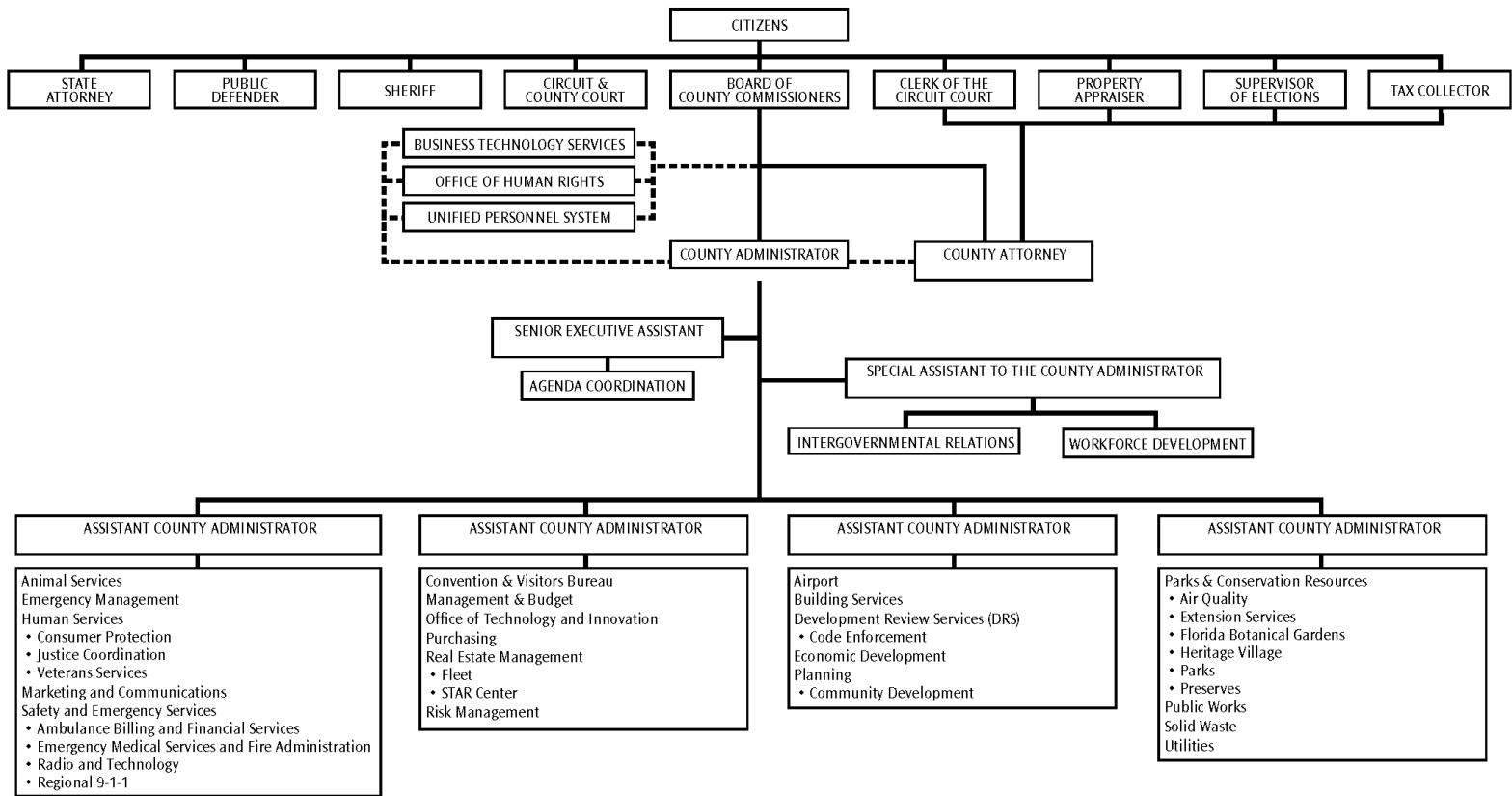
Each year over 5 million overnight visitors come to enjoy the County's 35 miles of pristine, powdery white beaches with an average of 244 sunny days annually. The County's Parks and Conservation Resources Department maintains over 24 parks consisting of 4,000 acres of beaches, lakes, and native habitat with playgrounds, learning centers for residents and visitors alike. The area has three major golf courses and about 40 additional courses for year-round golf lovers. Pinellas County, rich in cultural diversity, takes great pride in celebrating St. Petersburg's Annual MLK Dream Big Parade and Family Fun Day, the nation's longest-running parade honoring Dr. Martin Luther King, Jr. The County benefits from a unique and vibrant social fabric that embraces the values of diversity and inclusion evidenced by a growing Hispanic population in Clearwater, the highest percentage of Greek Americans for any city in the United States living in Tarpon Springs, and the popularity of the LGBT sponsored St. Pete Pride Parade held to celebrate the power and beauty of diversity, with more than 200,000 attending each June.

The County offers quality public schools, governed by an elected school board and appointed superintendent, with a broad variety of educational options including magnet programs, educational gifted programs, alternative schools, exceptional schools, and workforce development programs. In addition, there are a number of private and parochial schools in the area. Post-secondary education opportunities in the area include the University of South Florida, with campuses in Tampa and St. Petersburg, Eckerd College, and St. Petersburg College. Stetson University's College of Law is located in Gulfport, and Pinellas Technical College with campuses in St. Petersburg and Clearwater, provides students with information technology, robotics/computer-aided technology and other vocational training programs.





Government Organizational Chart



VISION

- To Be the Standard for Public Service in America.
- To achieve our vision we place the highest importance on:
 - Quality Service
 - Respectful Engagement
 - Responsible Resource Management

MISSION

Pinellas County Government is committed to progressive public policy, superior public service, courteous public contact, judicious exercise of authority, and responsible management of public resources to meet the needs and concerns of our citizens today and tomorrow.

PINELLAS COUNTY STRATEGIC PLAN GOALS

- Deliver First Class Services to the Public and Our Customers
- Ensure Public Health, Safety, and Welfare
- Practice Superior Environmental Stewardship
- Foster Continual Economic Growth and Vitality
- Create a Quality Workforce in a Positive, Supportive Organization

COUNTY ADMINISTRATOR POSITION

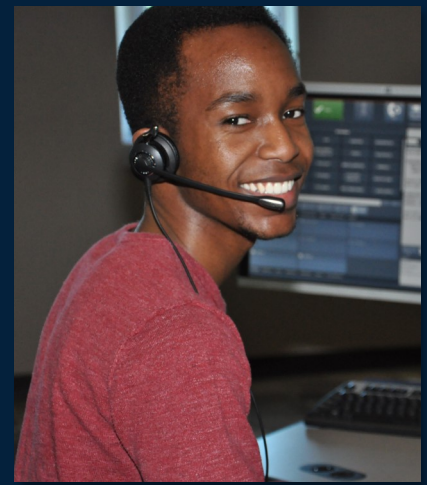
The County Administrator is responsible for managing the administration and operation of all functional areas and administrative divisions under the Pinellas County Board of County Commissioners and is directly responsible for over 2000 County employees. The County Administrator is also responsible for preparation of the County's overall budget, as well as for monitoring and tracking expenditures throughout the fiscal year. The County Administrator is appointed by a majority vote of the Board of County Commissioners. The functional areas and services that fall under the responsibility of the County Administrator include a variety of internal services such as Purchasing, Office of Technology and Innovation, Budget, Fleet and Risk Management. Other County Departments include Emergency Management, Real Estate, Marketing and Communications, Human Services, Animal Services, Emergency Medical Services, Regional 9-1-1, Convention and Visitors Bureau, Airport, Building Services, Code Enforcement, Planning, Economic Development, Development Review Services, Parks & Conservation Resources, Public Works, Solid Waste, and Utilities.



PRIORITIES AND CHALLENGES

The following list is representative of the challenges and priorities the new County Administrator will need to address within the first twelve to eighteen months on the job. This list was compiled after discussions with the Board of County Commissioners.

- Continue balancing the budget and achieving sustainability while maintaining the highest quality services
- Implement \$1.1 billion voter approved infrastructure improvements – Penny for Pinellas
- Support regional transportation projects
- Continue improving relations with Pinellas County's many public and private partners
- Facilitate continued assessment and implementation of affordable housing options
- Create work environment that encourages employee development, retention, and opportunities for advancement
- Renegotiate and implement electrical purchased power agreement with Duke Energy
- Facilitate regional conversations about water, transportation and other partnerships
- Continue seeking input from citizens using a multitude of methods such as town hall meetings, social media alerts and surveys, etc.



CANDIDATE PROFILE



The following list reflects the leadership, management style and personal characteristics desired in the ideal candidate:

- A record of exceptional leadership based on experience and knowledge
- Unquestioned personal and professional ethics
- An ability to effectively communicate with the Board of County Commissioners, Constitutional Officers, citizens, civic and business leaders, employees, and other city and county leaders throughout the region
- Experience managing a growing community and in negotiating successfully on behalf of the Board of County Commissioners with other cities, developers, attorneys, business owners, vendors, and other government and nonprofit agencies
- Knowledge and experience working with economic development policies, public incentives and other tools
- Outstanding interpersonal skills and a willingness to listen to other points of view without being offended
- Ability to engage in frank and respectful discussions with members of the Board of County Commissioners and all stakeholders and employees
- Patience, good instincts, excellent judgement, and the ability to say “no” when necessary
- A collaborative management approach which respects community and organizational traditions, while at the same time, moves the organization forward in a positive direction
- Empower and inspire employees to seek continuous improvement
- Be receptive to and embrace new technologies in an effort to promote innovation throughout the organization
- Ability to remain neutral even in politically-charged situations
- Possess the capacity to build a strong and cohesive workforce, constantly seeking input to improve the organization
- Believes in and practices transparency
- Utilizes humor in an appropriate manner and conducts their work with humility
- Approaches every initiative and project in a collaborative manner and conducts their work exhibiting the highest levels of integrity ensuring the long-term success for the Pinellas County organization, community, and Tampa Bay region



QUALIFICATIONS AND EXPERIENCE

The ideal candidate will possess a bachelor's degree in public or business administration, management, government, or a related field, and 7 years of progressively responsible experience in municipal or county government, or an equivalent combination of education, training, and/or experience. A masters' degree in public or business administration, or a related field is desired. Working for a similar sized municipal or county organization, or an organization of similar complexity, in an executive and management capacity is important and will be an advantage. A strong background in municipal budgeting, finance, and strategic planning is important.



COMPENSATION

A competitive starting salary based on the successful candidate's qualifications and experience will be offered, with the range extending from **\$212,000 to \$275,000** (Florida does not have a state income tax). Pinellas County offers a comprehensive and outstanding array of employee benefits. The County participates in the Florida Retirement System (FRS). The County provides a competitive retirement contribution with the employees' contribution set at 3% of gross salary. The County also offers an optional deferred compensation (IRS Section 457) plan, and provides Life Insurance, Short-Term Disability, Long-Term Disability, Group Health (choice of PPO or an HSA plan with employer account contributions), Prescription Drug Plan, Employee Assistance Program, Vision Care Program, and a choice of Dental Care Plans, either PPO utilizing any dental provider or a dental HMO. Paid Time Off includes 9 to 11 paid holidays per year, two paid floating holidays, plus two paid personal days per calendar year. Annual leave is provided for vacation, short-term illness, medical and dental appointments and personal emergencies. Visit <http://www.pinellascounty.org/hr/whatweoffer/> for Pinellas County's comprehensive and competitive array of employee benefits.



APPLICATION AND SELECTION PROCESS

Interested applicants should submit a cover letter and resume on-line at <https://springsted-waters.recruitmenthome.com/postings/1932>. This position is open until filled; **First review deadline is Friday, June 15, 2018**. Applications will be screened in relation to criteria provided in the recruitment brochure. The Board of County Commissioners will consider offering interviews to those candidates named as Finalists, with reference checks, background checks, and academic verifications conducted after receiving candidates' permission. For more information, please contact Art Davis at adavis@springsted.com or 816-868-7042.

Pinellas County is an Equal Opportunity Employer (EOE) and values diversity at all levels of its workforce!

Confidentiality: Under Florida's Public Records Act, information from your application is subject to public disclosure at any point in the recruitment process. For more information about Pinellas County, visit the website at www.pinellascounty.org.

 **Springsted Waters**
Executive Recruitment

14285 Midway Road, Suite 340 Phone: 972-481-1950
Addison, TX 75001 Fax: 972-481-1951
Springsted
380 Jackson Street, Suite 300 Phone: 651-223-3000
Saint Paul, MN 55101 Fax: 651-223-3002

Serving
**LOCAL GOVERNMENT
& ORGANIZATIONS**

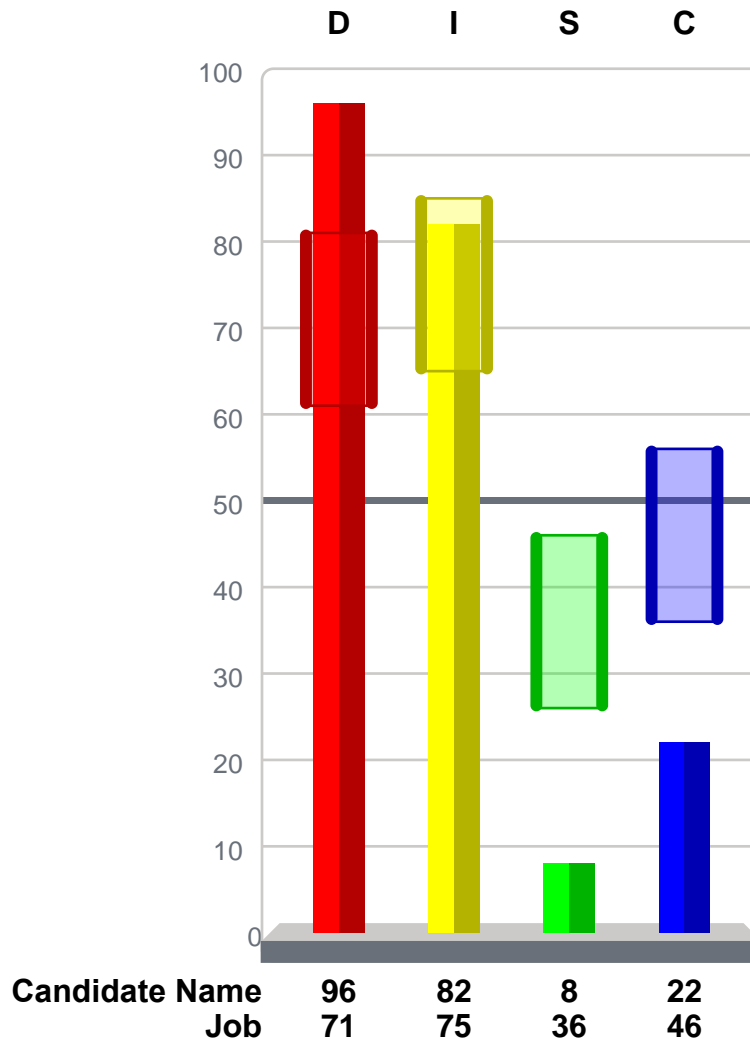


Appendix II: sample excerpt of TTI report



Workplace Behaviors® Candidate Name

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

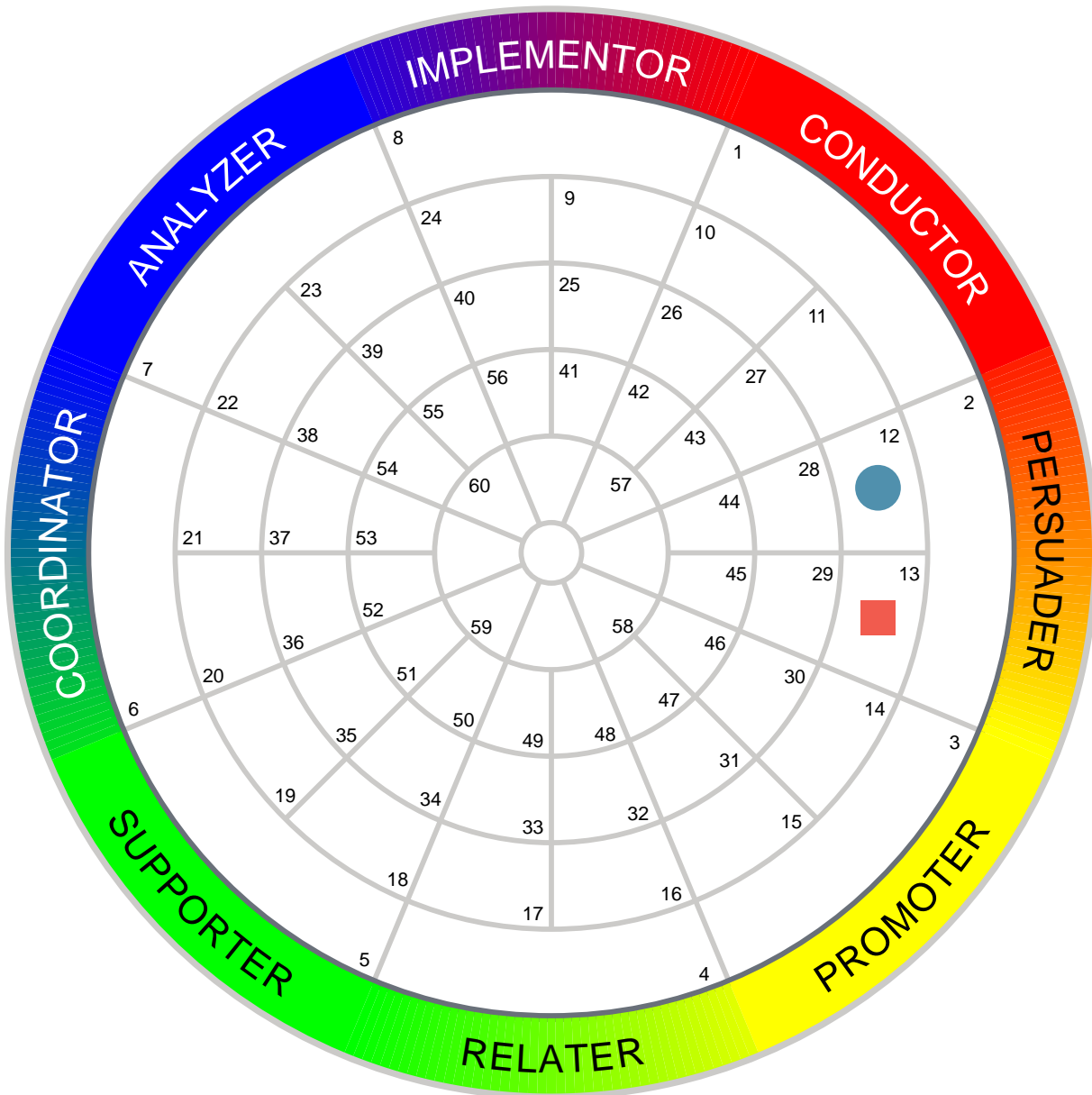


Job Range (20 point range)

Candidate Name










The Success Insights® Wheel











- Job - (13) PROMOTING PERSUADER
- Candidate - (12) CONDUCTING PERSUADER








Comparison Analysis For Consulting and Coaching

Job Competencies Hierarchy	Zone Range			Person
1. Customer Focus	91	—	100	50 
2. Teamwork	74	—	100	67 
3. Interpersonal Skills	72	—	92	73 
4. Influencing Others	86	—	100	68 
5. Flexibility	83	—	100	78 
6. Creativity and Innovation	66	—	84	62 
7. Leadership	75	—	93	85 

Primary Driving Forces Cluster	Zone Range			Person
1. Collaborative	35	—	57	6 
2. Selfless	40	—	62	61 
3. Harmonious	35	—	57	0 
4. Receptive	22	—	45	29 

Job Behavioral Hierarchy	Zone Range			Person
1. Competitive	73	—	100	90 
2. Interaction	60	—	84	90 
3. Versatile	54	—	74	100 
4. Frequent Change	52	—	72	92 

 Exact match
  Fair compatibility
  Good compatibility
  Poor compatibility
  Over-focused