



January 18, 2019

Sabrina Brennan, Commission President
San Mateo County Harbor District
504 Avenue Alhambra, Suite 200
El Granada, CA 94018

Dear Ms. Brennan:

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

We feel well suited to support your District in this assignment. We've completed an array of public sector General Manager, Executive Director, City Manager, and Department Director searches over the years. Please be assured that Avery Associates submits this proposal of executive search services with both the commitment and ability to perform all of the services described in this document.

Following your review of this proposal, it is our hope that our knowledge and background in municipal recruitment and our expertise in executive recruitment methodology will provide the basis for positive consideration of our firm. This proposal of recruitment services contains the following information:

- Company Overview
- Firm Qualifications/Experience
- Recruitment Team
- Recruitment Strategy
- Recruitment Schedule
- Consulting Fee
- Guarantees & Ethics

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

Sincerely,

Paul Kimura

Paul Kimura

William Avery & Associates, Inc.
Consultants to Management

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PROPOSAL FOR THE SAN MATEO COUNTY HARBOR DISTRICT RECRUITMENT FOR GENERAL MANAGER

William Avery & Associates, Inc. – Overview

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

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

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

Firm Qualifications/Experience – What Differentiates Avery Associates

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

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

Recruitment Team for the San Mateo County Harbor District

Paul Kimura will serve as the Project Lead for this assignment and will be assisted by Bill Lopez. Mr. Kimura will be personally involved in the initial client meetings, development of the ideal candidate profile and search strategy, interviewing and assessment of candidates, the



presentation of candidates, attendance at final interviews and will be available throughout the search process to provide other related consulting services.

Recruitment Plan

I. Position Profile and Organizational Assessment

The initial assessment phase is a critical component of the search process. Mr. Kimura will individually meet with the Harbor Commissioners to discuss the organizational needs and position requirements and to formalize the job description.

Our goal for this aspect of the recruitment process is to:

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

The formal position description and a subsequent ideal candidate profile would be developed from the above discussions and incorporated into the formal position announcement. The candidate profile is also utilized in various other means as a marketing tool, for advertising copy, postings, and for other announcements.

II. Development of the Search Strategy

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

- Development and contact of targeted candidate lists based on our extensive database of current recruitment contacts. We supplement these lists with referrals and recommendations from key sources and other current and former incumbents or related personnel who have extensive contacts and networks in this area.
- Job postings on Internet-based job boards, association-based web sites that are unique to specific disciplines and/or to the public sector in general.
- Original research, which consists of identification and contact of current incumbents or other candidates who meet the various profile, but are not actively seeking other employment. This is the crux of our direct and aggressive phone and email outreach



approach. It's our experience that despite extensive mailing, postings and announcements, many will not know of a position being available.

- Print advertising in various periodicals related to the public sector or to this discipline. Regular distribution magazines such as JOBS AVAILABLE magazine get a high degree of visibility.
- Development and distribution of the comprehensive position announcement to various city, county, and state departments, as well as agencies throughout the state and country.

III. Candidate Assessment

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

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

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

IV. Candidate Presentation

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

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

The Candidate book also identifies other candidates who were given secondary consideration, which provides the client insight on others who were interviewed.



Candidate summary sheets are created for everyone who submitted a resume would also be included. This provides the client an insight to the level and nature of response for their position.

V. Selection Process

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

VI. Position Closure and Follow-Up

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

As a matter of policy, Avery Associates monitors the transition and progress of any executive we place with a client. Within the first three to six months following the hired individual joining the District, we will speak with that individual to ensure the transition has effectively occurred. During the same period we will also review the individual's status with your office.

Recruitment Schedule

Task	Scheduled Dates
<i>Search Initiation, Marketing & Advertising Development:</i> <ul style="list-style-type: none"> ▪ <i>Initial meetings with Board and District staff to define the ideal candidate profile</i> ▪ <i>Develop working draft of the recruitment brochure for approval by client</i> ▪ <i>Recruitment strategy finalized</i> ▪ <i>Determination of advertising scope and placement deadlines</i> ▪ <i>Brochure designed and printed</i> 	<i>Weeks 1 - 4</i>
<i>Marketing, Advertisement and Outreach Period:</i> <i>Advertise in:</i> <ul style="list-style-type: none"> ▪ <i>Mailing of brochure</i> ▪ <i>Jobs Available</i> ▪ <i>Website postings</i> <i>Preliminary candidate screening</i>	<i>Weeks 4 - 8</i>
<i>Candidate screening</i>	<i>Weeks 7-8</i>
<i>Candidate interviews</i>	<i>Weeks 8-9</i>
<i>Complete references and prepare candidate book</i>	<i>Week 10</i>
<i>Presentation of candidates</i>	<i>Week 10</i>
<i>Final Interviews</i>	<i>Week 13</i>
<i>Appointment Offer/Acceptance</i>	<i>Week >14</i>



Task	Scheduled Dates
<i>Report to Work Date</i>	<i>Week > 14</i>

Consulting Fee

Based on the services described in our proposal, the professional services consulting fee for this recruitment will be \$18,900. We would provide our first consulting invoice in the amount of \$7,900 at the outset of the search. A second invoice of \$5,500 would be billed with the presentation of candidate recommendations and the final invoice of \$5,500 for the retainer will be submitted at the completion of the search. The consulting fee will be inclusive of all services defined within this proposal unless otherwise stated.

In addition to the Professional Services Fee, normal and direct out-of-pocket expenses associated with the search are charged back to the client. Expenses for this assignment would not exceed \$6,000 without the express consent of the District. These expenses include: advertising, clerical time, supplies, printing, telephone, postage, background checks and consultant travel for client discussions, meetings, local and out-of-area candidate interviews. All expense items are reimbursed "at cost" and will be detailed and billed on a monthly basis.

Guarantees and Ethics

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

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

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

