



July 31, 2020

Bill Lindsay, Interim General Manager
Kensington Police Protection and Community Services District
217 Arlington Ave.
Kensington, CA 94707-1401

Dear Mr. Lindsay:

Thank you for the opportunity to submit our recruitment proposal for the position of General Manager for the Kensington Police Protection and Community Services District. We feel well suited to fulfill your executive search requirements based on our track record of successful recruitments, our service approach, and overall recruitment expertise.

Avery Associates is an executive recruitment firm that conducts searches for senior level personnel in the areas of municipal, county and special district management. Our collective background includes executive experience in the public sector and extensive experience in municipal recruitment. We understand the scope and nature of the project and services required by the RFP and are confident of our ability to successfully meet the recruitment needs for the District.

Contacts and authorized representatives of Avery Associates are:

Bill Avery
3 ½ N. Santa Cruz Ave. #A
Los Gatos, CA 95030
(office) 408 399-4424
(cell) 408 472-7873
(email) bill@averyassoc.net
(fax) 408 399-4423

Paul Kimura, Principal
3 ½ N. Santa Cruz Ave. #A
Los Gatos, CA 95030
(office) 408 399-4424
(cell) 408 472-7936
(email) paulk@averyassoc.net
(fax) 408 399-4423

We believe our knowledge and background in municipal recruitment and our expertise in executive recruitment methodology will provide the basis for your positive consideration of our firm.

William Avery & Associates, Inc.
Consultants to Management

3-1/2 N. Santa Cruz Ave., Suite A
Los Gatos, CA 95030
408.399.4424
Fax: 408.399.4423
www.averyassoc.net

Please be assured that Avery Associates submits this proposal of executive search services with the commitment to honor all estimated base recruiting costs for a period at least one year from this date.

If you have any questions regarding our services or this proposal, please do not hesitate to call me at 408.472.7873 or Paul Kimura at 408.472.7936.

Sincerely,

William Avery

William H. Avery

WHA:jmc



PROPOSAL FOR THE KENSINGTON POLICE PROTECTION AND COMMUNITY SERVICES DISTRICT FOR THE RECRUITMENT OF THE GENERAL MANAGER

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. 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.

Experience

As a public sector search business that provides executive search support for municipalities, counties, and special districts, we are familiar with the governance structure of the Kensington Police Protection and Community Services District and feel well suited to support your recruitment needs. Our track record for recruitment of similar positions at the City Manager, General Manager and Executive Director levels include current assignments for City Manager for the City of Foster City, Executive Director of Governmental Operations for the Federated Indians of Graton Rancheria, and CEOs for Butte Choice Energy and San Diego Community Power.

We've also recently completed searches for City Manager for the cities of Hawthorne, Port Hueneme, Simi Valley, Whittier, Stockton, Pinole, Tulare and Sand City; CEO/GM for the Santa Clara Valley Water District; Executive Director for the Sites Reservoir Project JPA; Chief Assistant Director/COO - Department of Health and Human Services for Marin County; Executive Director for the Housing Authority of Alameda County; Chief Administrative Officer for the Nampa & Meridian Irrigation District; and District Manager for the West Bay Sanitary District.

Our overall experience in executive recruitment is extensive. Below is a partial list of executive level recruitments conducted within the last three years.



Organization	Position	Filled
Sites Reservoir Project	Executive Director	5/2020
County of Monterey	Chief Probation Officer	4/2020
County of Marin	Chief Assistant Director/COO	4/2020
West Bay Sanitation District	District Manager	4/2020
City of Hawthorne	City Manager	3/2020
San Mateo County Fld&Sea	CEO	3/2020
City of Port Hueneme	City Manager	2/2020
City of Stockton	City Manager	1/2020
City of Simi Valley	City Manager	1/2020
Santa Clara Valley Water District	Asst. Dist Council	1/2020
City of Pinole	City Manager	12/2019
WCCIWMA	Executive Director	11/2019
San Diego Water Auth	General Manager	11/2019
City of Whittier	City Manager	11/2019
City of Sand City	City Manager	11/2019
City of Port Hueneme	Deputy CM	10/2019
City of Cupertino	Asst CM	9/2019
City of Trabuco Canyon	Dist General Manager	8/2019
City of Lafayette	City Manager	8/2019
City of Santa Rosa	Chief Asst City Attorney	8/2019
City of Tulare	City Manager	6/2019
Monterey County	Asst Ag Commissioner	4/2019
City of Martinez	City Manager	3/2019
City of Antioch	City Attorney	3/2019
City of San Leandro	Asst City Manager	12/2018
West Cnty Wastewater Dist	General Manager	11/2018
City of Vallejo	Chief Asst City Attorney	11/2018
City of Sunnyvale	Deputy City Manager	10/2018
City of Los Angeles	Director of Auditing	10/2018
City of Merced	City Attorney	10/2018
City of Half Moon Bay	City Manager	10/2018
City of Hermosa Beach	City Manager	9/2018
City of Fremont	City Manager	8/2018
City of Anaheim	City Manager	6/2018
City of Santa Rosa	CFO	6/2018
Housing Auth Cnty Monterey	Exec Director	6/2018
City of Anaheim	City Attorney	3/2018
City of Port Hueneme	Dep City Manager	1/2018
City of Vallejo	City Manager	12/2017
City of Visalia	City Manager	12/2017



Organization	Position	Filled
City of Benicia	Asst City Manager	11/2017
City of Tracy	City Attorney	8/2017
City of Fullerton	City Manager	6/2017
City of Vallejo	Asst City Attorney	6/2017
City of Redding	City Manager	6/2017
City of South El Monte	City Manager	6/2017
City of Monte Sereno	City Manager	5/2017
Delta Diablo	General Manager	5/2017
City of Hermosa Beach	City Manager	4/2017
City of Selma	City Manager	4/2017
City of Benicia	City Manager	3/2017
City of Lodi	Deputy City Manager	3/2017

Ensuring a Diverse Recruitment Effort

Our track record reflects great success in placing females and candidates of color. Our approach consists of several tactics in developing our search strategy and outreach efforts.

- Contact women or candidates of color who we previously placed or whom we’ve worked with. We often find this source to be the most effective way to identify similar qualified candidates.
- Maintain contacts with minority based “affinity” groups, especially those focused on the public sector.
- Original research of agencies, associations and individuals related to the recruited for positions. Direct contacts to approach them as candidate or source of referrals. Linked In is an excellent source of research and contacts for this effort.
- Utilize contacts within our extensive database of candidates developed over our many years as an executive search consulting business.

Recruitment Team for the Kensington Police Protection and Community Services District

Bill Avery and/or Paul Kimura will serve as the Principal in charge of this project and will be assisted by Bill Lopez (resumes/profiles included). Mr. Avery and/or Mr. Kimura will be personally involved in the initial client meetings, development of the ideal candidate profile and search strategy, interview and assessment of candidates, referencing and presentation of candidates, attendance at final interviews, and will be available throughout the search process to provide other related consulting services.



Avery Profile

William Avery

William Avery founded his successful management consulting firm in 1981. He has directed William Avery & Associates in service as a Labor Relations and Executive Search consultancy, serving personally as a chief negotiator, trainer, and representative in grievance and disciplinary matters.

A specialist and widely recognized expert in employer-employee relations, he has served as a City Manager (Los Gatos) and Assistant City Manager. While City Manager, he was President of the Santa Clara County City Manager's Association and Chair of the County Employee Relations Service.

Bill has lectured at De Anza College, San Jose State University, and Stanford University, and regularly makes presentations for the League of California Cities, CALPELRA, and other public sector organizations.

Building on his personal track record of success, he expanded the firm's focus to include increased emphasis on public and private sector search. He added proven industry professionals with expertise in these areas. The result has been to create an exceptionally strong management consulting firm, now known as Avery Associates, with the expertise to provide the full range of services required for successful public or private sector executive search.

A key measure of the firm's success has been the many long-term relationships that he and his staff have established with clients.

Bill holds B.A. in Political Science and an MPA from San Jose State University, where he was graduated with highest honors.



Avery Profile

Paul Kimura

Paul Kimura brings a unique combination of recruitment and business experience to Avery clients.

Paul is involved in leading Avery's public sector professional searches. He has been both a corporate recruitment director and HR director for a number of high technology companies, ranging from Fortune 500 firms such as Novell and National Semiconductor to a Silicon Valley start-up. His proven recruitment and HR generalist skills help him bring forward the best available candidates and properly assess their skills and "fit" with client organizations.

Indeed, many of the recruitment strategies and tactics incorporated into the Avery search process are a direct result of Paul's extensive recruitment experience in the high technology industry.

Paul has been a successful HR consultant, guiding clients through all aspects of Human Resources functions — compensation & benefits, employee and management training, performance management, and termination issues.

He is skilled in areas such as strategic planning, executive coaching, separation negotiation, and organizational assessment and design. It's another service that Avery Associates is able to offer its clients because of the unique background of its principals — and Paul's extended skill set in Human Resources underscores the fact that Avery professionals "have been there" and understand your needs from a personal perspective.

Paul holds a B.S. degree in Business Administration from San Jose State University. He is active in professional HR organizations and in the community, where he has worked with a number of education, youth service, civic, business, and cultural organizations.

"Just as Avery looks to form long-lasting relationships with its clients, I believe in making the same commitments within my community."



Avery Profile

Bill Lopez

Bill is the newest member of Avery and Associates, joining us in September 2015. Bill has extensive experience in public sector management in both administration and operations. Bill recently retired, in June 2015, as the Chief Administrative Officer/Director of Business Services for the Santa Clara Valley Transportation Authority (VTA). In this position he served as an executive manager over administrative departments including Human Resources, Labor Relations, Risk Management/Safety, Technology, and Procurement.

Bill has served in other management positions as well, primarily with the City of San Diego, which include Director of Risk Management/Safety, Deputy Director of Wastewater Operations & Maintenance, Labor Relations Officer, and Supervising Personnel Analyst. He also served as an Assistant Deputy Probation Officer for the County of San Diego. Bill graduated from San Diego State University in 1983.



References

- I. County of San Mateo
Rochelle Kiner, Administrative Services Deputy Director; 650.599.1423;
email: rkiner@smcgov.org
- II. City of Lodi
Adele Post, HR Manager; (M) 209.918.6924; email: apost@lodi.gov
- III. San Diego County Water Authority
Ashley Kite, Acting Human Resources Manager; 858.522.6667; email: akite@sdewa.org
- IV. City of Stockton
Michael Tubbs, Mayor; 209.937.8499; email: michael.tubbs@stocktonca.gov
- V. County of Monterey
Irma Ramirez-Bough, Human Resources Director, 831.970.7022 (C)
email: boughir@co.monterey.ca.us

Recruitment Plan and Services Provided

I. Position Profile and Organizational Assessment

The initial assessment phase is a critical component of the search process. Mr. Avery or Mr. Kimura will individually meet with the District Board of Directors to discuss the organizational needs and position requirements. Additionally, we would meet with any key staff members recommended by the District. If the District Board feels it important to secure community input we have several outreach efforts we've successfully utilized to engage and secure that input. For a community such as Kensington, we feel a computer based survey linked to your community website would be an ideal approach. We would develop and implement a community survey at no additional cost to the District.

Following our initial meetings with the Board, our goal for this aspect of the recruitment process is to:

- Understand the District's 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.

II. Development of the Search Strategy and Candidate Outreach

Our search strategy will be developed in conjunction with the organizational assessment. For this assignment, we feel it is critical to develop a high level of visibility with a comprehensive outreach program supplemented by a focused targeted recruitment approach. We would incorporate the following elements into this search:

- Development and contact of a targeted candidate list. This list would be based on previous recruitment contacts, referrals and recommendations from key sources and from our recruitment database would be an excellent starting point.
- Extensive utilization of Internet-based job boards and association-based websites.
- Original research, which begins with identification and contact of individuals currently in the profession or other candidates who meet the profile but are not actively seeking employment. This is the crux of our direct and aggressive phone and email outreach approach.
- Development and electronic distribution of the comprehensive position announcement.
- Utilization of print advertising in various periodicals related to the various position being recruited.

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 firm Consultant. Candidates who pass the initial “qualifying” criteria are then scheduled for a formal interview with Mr. Avery or 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. The philosophy here is that the best indicator of future performance is assessing past behavior. This methodology allows the firm to “project” how a candidate would approach and address 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 and initial reference interviews, a selection of candidates for presentation is made. We feel our extensive screening, interview, and reference process; combined with the knowledge gained during our initial assessment period, enable our client to proceed with fewer rather than more finalists.

The final candidates are presented in our candidate presentation "book." Each finalist will have a file consisting of a candidate summary sheet, a resume, the Candidate Assessment Report (based on the formal interview), and initial candidate reference reports.

V. Selection Process

Once the final candidate interview group is identified, we will support the District with the final interview process as requested. Our firm will provide candidates with guidance related to travel planning, hotel accommodations, as well as other interview planning issues.

VI Recruitment 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 the formulation of 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 after the District has hired the individual, we will speak with that individual to ensure that an effective transition has occurred. During the same period, we will also review the individual's status with your office.



Recruitment Timeline

Task	Scheduled Dates
<i>Search Initiation, Marketing & Advertising Development:</i> <ul style="list-style-type: none"> ▪ <i>Initial meetings with District Board and 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 11</i>
<i>Final Interviews</i>	<i>Week 13</i>
<i>Appointment Offer/Acceptance</i>	<i>Week >14</i>
<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 \$17,900. If awarded the search, we would request an initial retainer of \$7,900 at the outset of the search. A second invoice of \$5,000 would be submitted upon the Client's acceptance of a finalist candidate group. The final balance of \$5,000 would be invoiced upon acceptance of a job offer constituting completion of the search. Our invoicing model ensures the firm will remain totally committed to the District throughout the duration of the search as the final invoice is not submitted until the District has an accepted candidate. The consulting fee will be inclusive of all services defined within this proposal unless otherwise stated. The "breakdown" of services is reflected in the chart below.

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 be a not-to-exceed amount of \$5,500 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 and local or out-of-area candidate interviews. All expense items are reimbursed "at cost" and will be detailed and billed on a monthly basis.



Value Added

On occasion, our potential clients inquire about the “value” provided in retaining a search firm to conduct a recruitment. We feel there are several major differentiators: first, we have a vast network and database of public sector executives, many with whom we have active work relationships. They are receptive to our contact and outreach to them. They might not otherwise know of or be inclined to apply for a position. A second advantage is the confidential manner in which we operate. Candidates are confident they will not be compromised by premature disclosure to their current employer. The third and perhaps greatest advantage is our presentation of candidates to the client. As noted in our proposal, we conduct behavioral based interviews with candidates and subsequently conduct two initial reference interviews in addition to performing an Internet check on all candidates we would recommend for further consideration. This level of evaluation ensures the candidates presented have been thoroughly vetted short of a full background check.

Subcontractors

JP Graphics	Moore Information Services, Inc.
Joan Escover	Online
3310 Woodward Ave.	Background checks – criminal/civil
Santa Clara, CA 95054	court records, identity verification
408-235-8821	and degree verification
Printing of brochures	

Previous Contracts with the District

Avery Associates hasn’t provided any prior work for the District.

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.

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.

