

Executive Recruitment Search

CITY MANAGER

City of North Port, FL



CITY MANAGER

City of North Port, FL

March 22, 2017

VIA EMAIL

Ms. Alla V. Skipper
Sr. Contract Specialist
City of North Port
4970 City Hall Blvd
North Port, FL 34286

Dear Ms. Skipper:

Alliance Resource Consulting is pleased to submit this proposal to assist the City of North Port in its efforts to recruit and screen candidates for the City Manager position. Enclosed is our proposal which outlines how we would partner with your organization to recruit the best individuals. It describes the steps we will take to accomplish the recruitment within your desired timeframe.

Alliance Resource Consulting's corporate motto is "The Power of Partnership." We take this seriously and have built our reputation on providing services of the highest quality. Alliance Resource Consulting was formed in 2004 and has a proven track record of success with more than 550 placements to our credit.

We do not have any potential conflicts of interest from past recruitments or relationships. We will be happy to answer any additional questions you may have. We look forward with great interest to working with you on this very important assignment.

Sincerely,



Sherrill Uyeda
Founding Partner

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1 – OUR UNDERSTANDING

It is our understanding that the City of North Port wishes to engage an executive search firm to assist in its City Manager recruitment.

The City Manager is the Chief Administrative Officer of the City, appointed by the Commission. City Manager directs and coordinates administration of the City in accordance with policies determined by the City Commission, appoints department heads with the exception of the City Clerk, and oversees the operational activities of all departments. The City Manager prepares and submits a recommended annual budget to elected officials for review and approval.

Alliance Resource Consulting prides itself on its commitment to customer service to both the client and the candidates.

2 – FIRM QUALIFICATIONS



2.1 Project Team

In 2004, Alliance Resource Consulting acquired the national executive recruiting practice of MAXIMUS. We are committed to providing our clients with the highest caliber of service in the industry. Our team of dedicated professionals utilizes custom-built state-of-the-art technology in conducting a search.

We are based out of Long Beach, California. We also have offices in Palo Alto, California; Tallahassee, Florida and Seattle, Washington.

Our current staffing is:

Sherrill Uyeda – Founding Partner
Cindy Krebs – Regional Director, Pacific Northwest
David McDonald – Regional Director, East Coast
Syldy Tom – Manager
Richard Kaplan – Research Consultant
Geoff Gambling – Research Consultant
Linda Kann – Special Projects and Graphics Manager

David McDonald and Sherrill Uyeda will work on this recruitment. Biographies can be found in Appendix B and references can be found in Appendix C.

2.2 Our Experience

We believe we are exceptionally well qualified to assist you. We have extensive nationwide experience recruiting chief executives for government agencies and special districts and have helped to place excellent people in both small and large organizations.



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Our recent City Manager and Assistant City Manager recruitments include:

- City of Hawaiian Gardens, CA – 2016
- Town of Ross, CA – 2015
- City of Santa Monica, CA – 2015
- City of Monrovia, CA – 2014
- City of San Jose, CA – 2014
- City of Port Hueneme, CA – 2013
- City of Compton, CA – 2012
- City of Bellflower, CA – 2011
- City of Tigard, OR – 2011
- City of Norwalk, CA – 2011
- City of Hillsboro, OR – 2011
- City of Seal Beach, CA – 2011
- City of El Segundo, CA – 2011
- City of Moreno Valley, CA – 2011
- City of Sanger, CA – 2010

In addition, our consultants have completed numerous “C-Suite” recruitments in the past few years, including:

- Assistant Retirement Administrator - Fresno County Employees’ Retirement Association
- Retirement Plan Administrator - Merced County Employees’ Retirement Association
- Assistant Executive Director - Kern County Employees’ Retirement Association
- Chief Executive Officer - Alameda County Employees’ Retirement Association
- Chief Financial Officer - City of Stockton, CA
- Assistant Chief Financial Officer - City of Culver City, CA
- Retirement Administrator - Fresno City Employees’ Retirement System
- Retirement Administrator - Imperial County Employees’ Retirement System
- Executive Director, Ethics Commission - City and County of San Francisco, CA
- General Manager - Long Beach Water Department
- General Manager - Marina Coast Water District
- Chief Financial Officer, Water & Wastewater - Broward County, FL
- Retirement Administrator - Mendocino County Employees’ Retirement Association
- Chief Executive Officer - Santa Barbara County Employees’ Retirement System
- Finance Director/City Treasurer - City of Glendora, CA
- Retirement Investment Officer - City of San Jose, CA
- Chief Executive Officer - Contra Costa County Employees’ Retirement Association
- Finance Director - City of El Monte, CA
- Chief Financial Officer - Santa Margarita Water District
- Chief Investment Officer - City of San Jose, CA
- Executive Director - Kern County Employees’ Retirement Association
- Retirement Administrator - Sonoma County Employees’ Retirement Association
- General Manager - Municipal Water District of Orange County
- General Manager - Rincon del Diablo Municipal Water District
- Deputy Executive Director - Port of Long Beach



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- Assistant General Manager - Coachella Valley Water District
- General Manager - Coachella Valley Water District
- Director of Retirement Services - City of San Jose, CA
- General Manager - Emerald Bay Service District
- General Manager - AC Transit
- Chief Executive Officer - Santa Barbara County Employees' Retirement System
- Deputy Executive Director - Port of Oakland
- Executive Director - Port of San Francisco
- Executive Director - Manatee County Port Authority
- Chief Executive Officer - Coachella Valley Economic Partnership
- General Manager - Chino Basin Desalter Authority
- Assistant General Manager - Rancho California Water District
- Assistant General Manager, Energy - Imperial Irrigation District
- Assistant Finance Director - Coachella Valley Water District
- Retirement Administrator - Marin County Employees' Retirement Association

Our ability to carry out the work required by your agency is enhanced by our past experience in providing similar services to others, and we expect to continue such work in the future. It should be noted that all of the recruitments listed above were completed on time and within budget.

We will preserve the confidential nature of any information received from you or developed during our work on this recruitment in accordance with our established professional standards.

We assure you that we will devote our best efforts to carrying out the work required. The results obtained, our recommendations and any written material we provide will be our best judgment based on the information available to us.

2.3 Advantages of Our Firm

Relative to your present search requirements, we believe the principal advantages in using Alliance Resource Consulting which differentiate us from other firms are:

- Our track record of success in placing superior senior level executives in particularly sensitive and highly responsible/accountable positions.
- Our specialization in public sector executive search on a nationwide basis.
- Our extensive experience recruiting chief executives for government agencies and special districts.
- Our PROACTIVE recruitment of candidates who may not be seeking new employment and would not normally respond to routine advertising and highly qualified candidates who might be overlooked by traditional recruiting approaches.
- Our ability to develop and meet a recruitment timeline to fit your needs.
- The fact that we assign two professionals to each recruitment to ensure we are always available to quickly respond to your most pressing requirements.
- The quality of our work and the fact that most of our clients have retained our services on more than one engagement.
- Our proven ability to identify and recommend qualified female and minority candidates.
- The transparency of our recruitment process. We will provide you a client login to our recruiting system so you can see how things are progressing at any time. We will also prepare weekly updates for you throughout the peak of the recruiting process.



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- Our reputation among clients and candidates for timely communication and documentation (e.g., acknowledgement of receipt of candidate application, client status reports, candidate interviews, client meetings and candidate feedback).
- The thoroughness of our documented reference, internet and background checks. We request very specific references from candidates and supplement our reports with information gathered from available information sources such as LexisNexis and public records. Our ability to enhance the recruitment process through stakeholder outreach, the use of online surveys, and targeted research.
- The fact that all of our graphics work is done in-house, saving our clients time and money.
- Our promise to conduct the recruitment at the cost proposed. We have never charged a client more than our proposed amount.

3 – RECRUITMENT METHODOLOGY & APPROACH

Alliance Resource Consulting believes that we are an extension of your organization. As such, we work within your expectations and guidelines. Our objective is to find the best qualified candidates. While notices in professional journals may be helpful, many of the best candidates must be sought out and their interest encouraged. Our general familiarity with the organization, knowledge of the field and our relationships with professional organizations make us well qualified to assist you.

Our clients have found that we are able to:

- Develop the appropriate specifications for a position.
- Encourage the interest of top-level people who would be reluctant to respond to advertisements.
- Preserve the confidentiality of inquiries, consistent with State public disclosure and open meeting laws.
- Save a considerable amount of time for client staff in developing and responding to candidates.
- Protect the confidentiality of the information discussed with or received from the client.
- Build consensus among those involved in the hiring process.
- Independently and objectively assess the qualifications and suitability of candidates for the particular position for which we are recruiting.
- Adhere to client's budget and schedule expectations.

If you desire to retain us for a full and thorough recruitment process, we will do the following for your recruitment:

3.1 Strategy Development

We will interview members of the Search Committee and other client contacts to obtain a detailed understanding of the position, key goals and challenges, and organizational culture. We will also discuss expectations regarding desirable training, experience and personal characteristics of candidates. In addition, should you request it, we will conduct/facilitate community outreach meetings and focus group discussions.

We also have experience creating and managing community surveys, should the organization want input from its constituents. We will also gather/review relevant information about the organization, such as budgets, organization and/or department goals, organization charts, etc.

Once our findings have been summarized, we will submit a Recruitment Profile with the desired qualifications and characteristics to you for approval. The Recruitment Profile that will be sent to potential candidates will include information about the organization, the job and the criteria established by you.

3.2 Active Recruitment

Once you have approved the Recruitment Profile, we will actively seek out individuals who meet your expectations. To achieve the best response, we will take a three-prong approach to attracting candidates:

1. **Direct Contact** – We will mail invitations and recruitment profiles to targeted individuals in comparable organizations at the appropriate level. These invitations will be followed up with direct phone calls to potential candidates to gauge interest.
2. **Internal “Job Alert”** – Over the past twelve years, we have developed an active database of over 22,000 candidates who are active in various public sector positions. We will send a new “job alert” to all our registered users in the Alliance Resource Consulting candidate application program. Prospective candidates will be contacted via e-mail with a link to the PDF version of the Recruitment Profile.
3. **Advertisements** – We will place job advertisements in the appropriate professional journals and on-line sites.

As a matter of corporate policy, we do not discriminate against any applicant for employment on the basis of race, religion, creed, age, color, marital status, sex, sexual preference, disabilities, medical condition, veteran status or national origin. A substantial percentage of the placements made by our firm have been minority or female candidates.

Frequent communication with our clients is a hallmark of our firm. While consultants will provide regular updates on the progress of your search, you will also be able to access up-to-date ‘real time’ information regarding your search from our secure website.

3.3 Candidate Evaluation

We will review, acknowledge and evaluate all resumes received. Candidate evaluation will begin with an analysis based upon criteria contained in the Recruitment Profile, information contained in the resumes submitted to us, and our knowledge of the people and organizations for which they work.

The next phase in candidate evaluation will focus on gaining additional information from the qualified group of candidates through written supplemental information questionnaires and other resources. Telephone interviews will be conducted with the most promising candidates to gain a better understanding of their backgrounds, qualifications and interest in the position.

3.4 Progress Report Meeting

After the resume deadline, we will submit to you a progress report of the leading candidates. This report will include summary resumes, supplemental information, and the original resumes of those candidates we believe to be best qualified for the position. Supplemental information on a candidate typically includes: the size of the organization for which the person works, reporting relationships, budget responsibility, the number of people supervised, related experience and reasons for interest in the position. Any other specific information will be dictated by the criteria set forth in the Recruitment Profile.

The purpose of our progress report is two-fold. It allows you an opportunity to review the candidates and choose those who you would like to invite to be interviewed for the position. It also allows us to receive feedback on the caliber of the candidates recruited. In addition, at this point we will have conducted preliminary background checks on each of the presented candidates. Of course, we are flexible and may consider other individuals as final candidates who are subsequently identified and were not included in the progress report.

3.5 Preliminary Interviews

We will interview (either in person or via video-conference) those candidates identified by you to be the leading candidates. We will conduct a preliminary interview with questions that focus on the selection criteria. Additionally, we will verify degrees and certifications and continue to gather information about the candidate's professional backgrounds.

3.6 Client Interviews & Interview Books

We will assist you in scheduling final candidates for interview with your organization, and will send the candidates packets of information which we obtain from you should you request it (e.g., information about the organization and the geographic area, budgets, etc.).

We will prepare final interview books for the selection panel. These books will include interviewing/selection tips, suggested interview questions, and rating forms for your use. Candidates will not be ranked, for we believe it will then be a matter of chemistry between you and the candidates.

We will also be on-site for the interview day(s). We will brief the interview panel at the start of the interviews and will facilitate the process throughout the day. After the last candidate interview, we will assist you in "debriefing" the interview panel members.

As part of our process in evaluating candidates, we make telephone reference checks. In conducting these references, it is our practice to speak directly with individuals who are, or have been, in a position to evaluate the candidate's performance on the job. To gain a well-rounded impression of the candidates, we speak with current and prior supervisors, peers and subordinates. These references and our evaluations provide you with a frank, objective appraisal of the candidates. Once we finalize references on the top one or two candidates and conduct credit/criminal/civil litigation/motor vehicle record checks through an outside service, we will provide you with a detailed candidate evaluation report.

3.7 Special Assistance

Our efforts do not conclude with presentation of the final report. We are committed to you until a successful placement is made. Services that are routinely provided include:

- Arranging the schedule of interviews and the associated logistics for final candidates.
- Advising on starting salary, fringe benefits, relocation trends and employment packages.
- Acting as a liaison between client and candidate in discussing offers and counter offers.
- Conducting a final round of reference checking with current employers (if not previously done for reasons of confidentiality).
- Notifying those candidates who were not recommended for interview of the decision. Following up with the client and the selected candidate once he/she has joined the organization to ensure a smooth transition.

4 – OUR CLIENT'S ROLE

The client has a very important role in the recruitment process. While we may identify and recommend qualified candidates, it is the client who must make the decision about which candidate to hire.

In order to insure that the best candidates are available from which to choose, our clients should be willing to do the following:

- Clearly inform us about matters relevant to the search that you wish to keep confidential (e.g., salary, personnel issues, and other privileged information).

- Supply us with the names of people you have previously interviewed/ considered for this position.
- Forward us copies of the resumes you receive, to avoid duplication of effort.
- Provide feedback to Alliance Resource Consulting regarding the information and recommendations provided by us.
- Promptly decide upon and follow up in scheduling interviews with the most promising candidates.
- Assist in providing information to candidates that will enable them to make their career decisions.
- Uphold confidentiality (while respecting relevant state laws about open disclosure) to protect the integrity of the recruitment process, as well as the candidate's involvement.

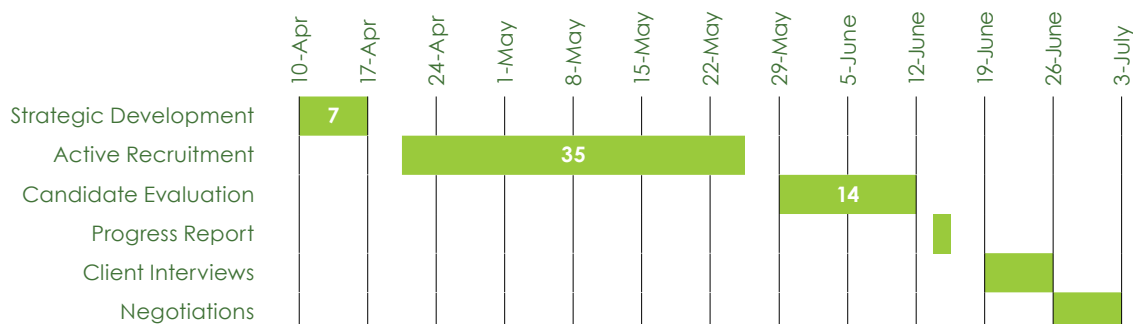
By doing the above, we will maximize the likelihood of mutual success.

Finally, please be reminded that the United States Immigration Reform and Control Act of 1986 requires that all employers verify an employee's eligibility to work in the United States. Since Alliance Resource Consulting cannot serve as your agent in this matter, your hiring process should include this verification procedure.

5 – PROJECTED TIMELINE

The following is a typical schedule to conduct a thorough recruitment. However, we would be pleased to modify this to meet your needs:

1st Week	Meet with the appropriate individuals to gather background information.
2nd - 3rd Week	Develop and obtain approval for the Recruitment Profile. Develop a list of potential candidates to target. Prepare and place advertisements, if desired.
4th - 7th Week	Active recruitment—solicit, receive and acknowledge resumes.
8th - 9th Week	Evaluate resumes and gather supplemental information. Submit progress report and meet with you to review leading candidates.
10th Week	Verify degrees and certifications and interview the best qualified candidates.
11th Week	Submit final report and initiate the interview process with you.
Following Interviews	Conduct references, credit/criminal/civil litigation/motor vehicle record checks, and assist with negotiations.



6 – ALLIANCE ADVANTAGES

6.1 Technology

Alliance Resource Consulting is the only firm to utilize a custom-built “online” client/candidate management system. This custom system allows candidates to input their resumes and cover letters on our website. (For candidates who wish to email or mail us a hard copy of their resume, we will input the information for them.) One of the benefits of our system is that it enables our client contact to check the latest applicant list in real-time.

One of our strengths is our use of social media to best market the recruitment. We have active accounts on LinkedIn, Twitter and Facebook. The use of social media allows us to contact our network and “followers” to alert them to our recruitment announcements, informational updates and reminders. It allows us to stay one step ahead of our competitors.

Alliance Resource Consulting is always searching for new ways technology can help us save our client’s money. One way we do this is by using Skype to interview out of town candidates. Our innovative ways have set us apart from our more traditional competitors.

6.2 Stakeholder Outreach

Our firm has used several methods, including stakeholder meetings, community forums and surveys, for stakeholder outreach in a number of previous recruitments. For example, for the previous City of San José City Manager recruitment, our consultants facilitated 13 community outreach meetings where citizens were invited to attend and express their opinions about what they were looking for in city manager candidates. For the City of Alexandria’s City Manager recruitment, we also met with special interest groups such as business leaders, Chamber of Commerce members and historic preservation groups.

During the recruitment of the City Administrator for the City of Huntington Beach (CA), the consultants met with each councilperson, each department head, conducted an open citizen forum and a forum for a group of stakeholders comprised of two citizens recommended by each councilperson. For the City Manager recruitment conducted for the City of Moreno Valley (CA), the consultants conducted a community panel as well. Our previous experience in stakeholder outreach makes our firm very qualified to conduct the meetings with the Mayor’s Office and City Council Members as well as facilitate multiple stakeholder outreach forums throughout the City that your request for proposal outlined.

Lastly, our firm has significant experience in creating community surveys should you wish to provide this option to your community. We have utilized surveys for many of our recruitments and can prepared them in different languages, if required. The surveys can be accessed on-line, or at our office and our client’s office.

6.3 Diversity Outreach

Striving for diversity in our recruitments is a hallmark of our firm. We use a variety of sources for outreach to various minority communities to ensure the desired diversity of our candidate pool. In addition to our personal contacts in various minority communities, we advertise our positions in publications that target minorities in government and further publicize the position through minority organizations such as Blacks in Government and the International Hispanic Network. To ensure a diverse pool, we also create a recruiting list of qualified candidates from communities that have a comparable level of diversity as our client’s community.

We have created lists for comparable diversity during recruitments for the City Manager for the City of Compton (CA), the City of Tigard (OR), the Assistant City Manager/Chief Operating Officer for the City of Ventura (CA), and the Assistant City Manager for the City of Irvine, CA. The final pool for the City of Irvine included three women

among the six finalists. We also collect Equal Employment Opportunity (EEO) information on our candidate pool. This information is accessible to our clients in real time on our company website.

6.4 Weekly Client Updates

Our consultants provide our client contacts written recruitment updates on a weekly basis. These updates include work done that was completed during the week and what we expect to work on the following week.

7 – RECRUITMENT COSTS

We propose a fixed fee of \$26,500 for the work outlined above, which includes up to three on-site meetings: one to develop the Recruitment Profile, one to present our Progress Report, and one to attend the first round of candidate interviews. If additional on-site meetings are required, a budget increase of \$1,500 per meeting will be added to the professional fee. Please note that this amount does not include reimbursement of candidates who travel to be interviewed by you. Unless you notify us to the contrary, we will assume that you will handle these reimbursements directly.

Our fee will be split among four equal invoices. All invoices are due and payable upon receipt. We do NOT base our fees on a percentage of the position's salary.

Our billing schedule on a retained fee (and based not on an hourly rate) is as follows:

1st Billing	Due after Start Meeting	First Phase	\$6,625
2nd Billing	Due upon our submittal of a draft recruitment profile	Second Phase	\$6,625
3rd Billing	Due after we meet and submit our Progress Report to you	Third Phase	\$6,625
4th Billing	Due after the client conducts interviews with finalists	Fourth Phase	\$6,625

Please note that this is a standard billing schedule and can be modified as requested.

You may discontinue this assignment at any time by written notification. In the unlikely event that this occurs, you will be billed for all expenses incurred to the date of the cancellation, and for professional fees based upon the time elapsed from the commencement of the assignment to the date of cancellation. If a cancellation occurs within the first 30 days of the assignment, following either verbal or written authorization to proceed, one-third of the professional fee will be due. If a cancellation occurs thereafter, the fee beyond the first one-third will be prorated based upon the number of calendar days which have elapsed. If a cancellation occurs after 90 days, all professional fees will be due in full.

In the event that the Client hires, within one year of completion of this recruitment project, any candidates identified during the Progress Report as a result of Consultant's recruitment project for any position other than the City Manager, the Client agrees to pay Consultant a fee of \$5,000 for each additional candidate hired.



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8 – ALLIANCE SUMMARY

Thank you for reviewing our proposal. Should you decide to retain Alliance Resource Consulting for your executive search needs, we will do the following:

- Partner with you and act as an extension of your organization.
- Define a recruitment strategy and timeline, develop a recruitment profile and attract/research prospective candidates.
- Conduct a multi-layered candidate screening analysis on the applicants.
- Communicate frequently and on-time with both the client and candidates.
- Allow client contacts to access the recruitment database in real time from remote sites.

Our firm's motto is "the Power of Partnership" and we are committed to adding value to your organization's goals and mission. We bring an ethical, transparent and well-documented recruitment process to all our clients.

9 – CONTACT INFORMATION

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Alliance Resource Consulting LLC

APPENDIX–A

Chief Executive Searches of Alliance Resource Consulting

CALIFORNIA, STATE OF

Anaheim, City of	City Manager
Arcadia, City of	City Manager
Bellflower, City of	City Manager
Butte, County of	County Manager
Carlsbad, City of	City Manager
Compton, City of	City Manager
Dana Point, City of	City Manager
East Palo Alto, City of	City Manager
El Segundo, City of	City Manager
Fresno, City of	City Manager
Hawaiian Gardens, City of	City Manager
Hemet, City of	City Manager
Hesperia, City of	City Manager
La Palma, City of	City Manager
Long Beach, City of	City Manager
Los Angeles, County of	Chief Executive Officer
Los Alamitos, City of	City Manager
Monrovia, City of	City Manager
Monterey Park, City of	City Manager
Moreno Valley, City of	City Manager
Morgan Hill, City of	City Manager
Norwalk, City of	City Manager
Pacific Grove, City of	City Manager
Placentia, City of	City Administrator
Port Hueneme, City of	City Manager
Riverside, City of	City Manager
Ross, Town of	Town Manager
San Bernardino, City of	City Manager
San Jose, City of	City Manager
San Jose, City of	Assistant City Manager
Santa Monica, City of	City Manager
Seal Beach, City of	City Manager
Stockton, City of	City Manager
Yorba Linda, City of	City Manager

OREGON, STATE OF

Astoria, City of	City Manager
Eugene, City of	City Manager
Hillsboro, City of	City Manager
Lake Oswego, City of	City Manager



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VIRGINIA, STATE OF

Alexandria, City of
Richmond, City of
Virginia Beach, City of

City Manager
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City Manager

WASHINGTON, STATE OF

Bellevue, City of
Kirkland, City of
Vancouver, City of

City Manager
City Manager
City Manager

APPENDIX–B

BIOGRAPHIES

David McDonald – Regional Director

David L. McDonald has over 36 years of continuous experience in the Maritime Industry. Mr. McDonald served as the Executive Director for Port Manatee, Florida for over 20 years. During his tenure, Mr. McDonald administered a \$250 million dollar port expansion project while limiting local investment to approximately \$20 million. Completion of the project resulted in a 50% increase in cargo moving capacity. Through January 2012, Mr. McDonald directed the ongoing \$750 million “North Port” expansion at Port Manatee. Mr. McDonald administered the most successful seagrass transplant and mitigation effort in Florida’s history and implemented a 3,500 acre inland port “Encouragement Zone” (EZ) to encourage public/private partnerships.

Mr. McDonald has worked with the State of Florida’s state legislature and Congress on Maritime matters of state and national significance and has served an elected seven member Port Authority. Mr. McDonald served the Florida Ports Council (FPC) as chair for ten consecutive years, three terms on the American Association of Port Authorities (AAPA) Board of Directors, chairman for Florida Ocean Alliance, and chairman for Florida Ports Environmental Committee.

Mr. McDonald has a Professional Port Manager certificate from American Association of Port Authorities, a Master of Business Administration from the University of South Florida and a Bachelor of Arts Degree from Florida International University.

Sherrill Uyeda – Founding Partner

Sherrill Uyeda has over fifteen years of public sector executive search experience. She began her career in executive search in 1998 with Norman Roberts & Associates, Inc. From 1999 to 2004, Ms. Uyeda was an executive search consultant with MAXIMUS, a leading government consulting firm which assists state, federal and local governments. In 2004, along with Eric J. Middleton, she founded Alliance Resource Consulting LLC.

Since 2007, Ms. Uyeda has been instrumental in expanding the organization’s presence to include regional offices in Palo Alto (CA), Tampa (FL) and Seattle (WA). She fosters an environment of frequent communication to both clients and candidates and transparent and ethical recruitments on a timely basis. Her leadership and collaborative skills have led to an impressive hiring and retention rate.

Ms. Uyeda’s track record of recruiting high-profile government executives across the nation in various industries include: city and county management, transportation, utilities, human resources, library services, building and planning, economic development and pension and retirement systems. Past clients for nationwide recruitments have included the City/County of San Francisco (CA), the County of Los Angeles (CA), Arlington County (VA), Broward County (FL), the City of Atlanta (GA), the City of Alexandria (VA), the City of Boston (MA), the City of Dallas (TX), and the City of San José (CA). Past retirement systems, she has recruited for are: Contra Costa County Employees Retirement Association, Fresno County Employees Retirement Association, Kern County Employees Retirement Association, Marin County Employees Retirement Association, Santa Barbara County Employees Retirement System, and Sonoma County Employees Retirement Association.



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Additional areas of expertise include: facilitating community forums and outreach meetings, conducting multi-lingual citizen surveys and compensation and benefits negotiations.

Ms. Uyeda graduated from the University of Southern California, with both a Bachelor of Arts degree in Communication Arts and Sciences and a Master of Public Administration degree. She is a member of the Society for Human Resources Management.

APPENDIX–C REFERENCES

City of Santa Monica, CA

Name: Rick Cole
Title: City Manager
Phone #: (310) 458-8301

Broward County, FL

Name: Mary McDonald
Title: Assistant Director of Human Resources
Phone #: (954) 357-0002

Alameda County, CA

Name: Mary Welch
Title: Former Director of Human Resources
Phone #: (650) 799-5272

Port Everglades, FL

Name: Steve Cernak
Title: Executive Director
Phone #: (954) 523-3404

Manatee County Port Authority, FL

Name: Carlos Buqueras
Title: Executive Port Director
Phone #: (941) 722-6621

REQUEST FOR PROFESSIONAL SERVICES QUOTE NO. 2017-36
SUBMITTAL SIGNATURE FORM

The signature below is a guarantee that the proposer shall not withdraw his/her quote for a period of **ninety (90) days after the scheduled quote proposal due date. If notified of the acceptance of the submittal, the undersigned agrees to accept the form of contract designated in this RFP Quote by the City** for the stated compensation in the form as prescribed by the City.

The undersigned further certifies that he/she has read the Request for Proposal Quote, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this quotation is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

As addenda are considered binding as if contained in the original specifications, it is critical that the contractor acknowledge receipt of same. The submittal may be considered void if receipt of an addendum is not acknowledged.

Addendum No. _____ Dated _____ Addendum No. _____ Dated _____
Addendum No. _____ Dated _____ Addendum No. _____ Dated _____

Company Information

Type of Organization (Please Check One):

Individual Ownership _____ Joint Venture _____ LLC/LLP ☒ _____
Partnership _____ Corporation _____ OTHER _____

Federal Identification Number: 57-1211151

Is this a Florida Corporation: ☐ Yes or ☒ No

If not a Florida Corporation,

In what state was it created: California
Name as spelled in that State: Alliance Resource Consulting LLC

What kind of corporation is it: ☒ "For Profit" or ☐ "Not for Profit"

Is it in good standing: ☒ Yes or ☐ No

Authorized to transact business in Florida: ☒ Yes or ☐ No

State of Florida Department of State Certificate of Authority Document No.: L13000146057

Respondent shall submit proof that it is authorized to do business in the State of Florida unless registration is not required by law.

Does it use a registered fictitious name: ☐ Yes or ☒ No

DBA (if any): _____

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REQUEST FOR PROFESSIONAL SERVICES QUOTE NO. 2017-36
SUBMITTAL SIGNATURE FORM

Company Name Alliance Resource Consulting

(562) 901-0769 info@alliancerc.com (562) 901-3082

Telephone # **E-Mail** **Fax #**

400 Oceangate, Suite 480 Long Beach, CA 90802

Mailing Address

400 Oceangate, Suite 480

Location Address

Long Beach CA 90802

City **State** **Zip Code**

(562) 901-0769 info@alliancerc.com (562) 901-3082

Telephone # **E-mail** **Fax #**

David McDonald, Regional Director Sherrill Uyeda, Founding Partner

Print Name & Title of Firm Representative (Contact Person)

Sherrill Uyeda March 22, 2017

Print Name Of Person Authorized To Bind The Company **Date**



Signature Of Person Authorized To Bind The Company

Do you accept Visa as payment for goods/services? ☐ YES ☒ NO

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REQUEST FOR PROFESSIONAL SERVICES QUOTE NO. 2017-36

REFERENCES - CLIENT LIST – SUBMITTAL FORM

SUMMARY EXPERIENCE/QUALIFICATIONS/CLIENT LIST (List similar projects, with completion dates showing experience) (At least three (3) in the past five (5) years).

1. Project Location: City of Hawaiian Gardens, CA

Name of Contact Person: Linda Hollinsworth Telephone # (562) 420-2641 x 201

Project Description: City Manager Recruitment

Total Project Amount: \$ 28,000 Start Date: 08/2016 Completion Date: 12/2016

2. Project Location: Fresno County Employees' Retirement Association, CA

Name of Contact Person: Donald Kendig Telephone # (559) 457-0350

Project Description: Assistant Retirement Administrator Recruitment

Total Project Amount: \$ 28,000 Start Date: 07/2016 Completion Date: 09/2016

3. Project Location: Port of San Francisco, CA

Name of Contact Person: Ted Yamasaki Telephone # (415) 557-4915

Project Description: Executive Director Recruitment

Total Project Amount: \$ 50,000 Start Date: 06/2016 Completion Date: 10/2016

4. Project Location: Broward County, FL

Name of Contact Person: Mary McDonald Telephone # (954) 357-6044

Project Description: Director of Business Development, Port Everglades

Total Project Amount: \$ 26,500 Start Date: 02/2014 Completion Date: 06/2014

FIRM NAME Alliance Resource Consulting

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**REQUEST FOR PROFESSIONAL SERVICES QUOTE NO. 2017-36
CONFLICT OF INTEREST SUBMITTAL FORM**

F.S. §112.313 places limitations on public officers (including advisory board members) and employees' ability to contract with the City either directly or indirectly. Therefore, please indicate if the following applies:

PART I:

☐ I am an employee, public officer or advisory board member of the City
_____ (List Position or Board)

☐ I am the spouse or child of an employee, public officer or advisory board member of the City
Name: _____

☐ An employee, public officer or advisory board member of the City, or their spouse or child, is an officer, partner, director, or proprietor of Respondent or has a material interest in Respondent. "Material interest" means direct or indirect ownership of more than 5 percent of the total assets or capital stock of any business entity. For the purposes of [§112.313], indirect ownership does not include ownership by a spouse or minor child.
Name: _____

☐ Respondent employs or contracts with an employee, public officer or advisory board member of the City
Name: _____

☒ None of The Above

PART II:

Are you going to request an advisory board member waiver?

☐ I will request an advisory board member waiver under §112.313(12)

☐ I will NOT request an advisory board member waiver under §112.313(12)

☒ N/A

The City shall review any relationships which may be prohibited under the Florida Ethics Code and will disqualify any vendors whose conflicts are not waived or exempt.

BUSINESS NAME: Alliance Resource Consulting

NAME (PER AUTHORIZED TO BIND THE COMPANY): Sherrill Uyeda, Founding Partner

SIGNATURE: 

DATE: March 22, 2017

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