



# Memorandum

**TO:** HONORABLE MAYOR AND  
CITY COUNCIL

**FROM:** Mark Danaj

**SUBJECT: REPORT ON PROPOSALS FOR  
EXECUTIVE SEARCH SERVICES**

**DATE:** October 11, 2006

Approved

*Ray Wines*

Date

*10/13/06*

**COUNCIL DISTRICT:** Citywide

The purpose of this memo is to present the City Council a recommendation of two executive search firms for its consideration to conduct the recruitment of a new City Manager.

## **RECOMMENDATION**

1. Review search proposals submitted by Alliance Resource Consulting and Avery Associates, the two recommended executive search firms;
2. Interview the two firms;
3. Select the firm to conduct the City Manager recruitment;
4. Direct the Director of Human Resources to contract with the selected search firm.

## **BACKGROUND**

On September 29, 2006 the City Council approved the executive search plan and timeline for the recruitment of a new City Manager as outlined in the Mayor's September 15, 2006 memo. Phase I of the City Manager executive search plan – Consultant Selection, directed staff to present two firms to Council for selection. The City Council expressed its desire that the executive search firms consider the significant amount of diversity and stakeholder outreach required as a part of this search.

## **ANALYSIS**

The solicitation of proposals for executive search services for the City Manager recruitment was sent to all firms on the City's pre-qualified vendor list. These include: Alliance Resource Consulting, The Arcus Group, Avery Associates, Bennet Yarger Associates, CPS Executive Search, L.B. Hayhurst & Associates and Bob Murray & Associates.

The solicitation requested each search firm detail its proposed recruitment approach, with a focus on diversity and stakeholder outreach. Proposals were submitted by five executive search firms; Alliance Resource Consulting, The Arcus Group, Avery Associates, L.B. Hayhurst & Associates and Bob Murray & Associates. Staff evaluated the proposals utilizing the following criteria: diversity outreach, stakeholder outreach, experience with large City/County recruitments and/or City Manager recruitments, and price. Executive summaries prepared by staff and the submitted proposals are attached for the two top ranking firms: Alliance Resource Consulting and Avery Associates.

Both recommended firms recognize the active neighborhood and economic communities of the City of San José and their importance in providing stakeholder feedback as well as the City Council's expectation that a group of diverse, highly qualified candidates ultimately be presented for consideration. Identified throughout the proposals are various ways in which the firms would outreach to our diverse constituencies to build a profile that would attract a diverse candidate pool as well as recruiting strategies designed to produce a diverse candidate pool.

The City will also require the selected firm to utilize diversity advertising packages that include top-performing, diversity specific online career boards.

### **COORDINATION**

This memo was coordinated with the City Manager's Office.

### **COST IMPLICATIONS**

It is anticipated that the recruitment will cost approximately \$45,500.

### **CEQA**

Not a project.

  
MARK DANAJ  
Director, Human Resources

For questions please contact Mark Danaj, Human Resources Director, at 975-1475.

#### Attachments:

Executive Summary—Alliance Resource Consulting

Executive Summary—Avery Associates

Full Proposal—Alliance Resource Consulting

Full Proposal—Avery Associates

Memo dated September 15, 2006 – Executive Search Plan and Timeline for Recruitment of a  
New City Manager



## **Executive Summary - Alliance Resource Consulting**

Alliance Resource Consulting is a Long Beach based firm formed in 2004 when its executive search consultants acquired MAXIMUS, a national search firm. In its proposal Alliance states, “Our familiarity with the City of San Jose, knowledge of the field and our relationships with professional organizations make us well qualified to assist you.”

### **Project Staff**

**Project Lead: Eric Middleton**, a founding partner and Vice President at Alliance, has been engaged in over 200 recruitments including police chiefs for Chicago, San José and San Diego, and City Manager recruitments with Huntington Beach and Millbrae. Prior to beginning his executive search career in 1999, Mr. Middleton spent 13 years in various positions with the County of Los Angeles and the City of Los Angeles. Mr. Middleton holds a B.A. in History from California State University at Northridge and an MPA from University of Southern California (USC). **Assistance: Sherrill Uyeda**, a founding partner, has over seven years public sector executive search experience and has completed over 275 recruitments. Ms. Uyeda holds a BA and MPA from USC. **Aggie Afarinesh** began her executive search career in 2003 and worked on the Assistant City Manager recruitment for Irvine and Assistant County Manager for Washoe County, Nevada.

### **Recent Recruitments**

Chief Administrative Officer: County of Los Angeles  
City Manager: Inglewood, CA and Alexandria, VA  
Assistant City Manager: Dallas, TX and Irvine, CA  
Assistant County Manager: Washoe County, NV

### **Recent San José Recruitments**

Deputy Director - Water Operations: Environmental Services Department  
Deputy Director - Wastewater Operations: Environmental Services Department  
Deputy Director - Watershed Protection: Environmental Services Department

### **Proposed San José City Manager Recruitment Plan**

Organization and Position Analysis  
Recruitment  
Preliminary Screening  
Progress Reporting  
Candidate Evaluation  
Final Reporting/Client Interviews  
Special Assistance

Alliance Resource Consulting highlighted its approach to a diverse and comprehensive outreach and proposed to outreach to various diverse communities to ensure diversity of the candidate pool. Alliance cited, as a strength, its personal contacts in various minority communities and proposed to compile a recruiting list of qualified candidates from communities that have a comparable level of diversity to San José.

### **Price**

\$ 20,000 Fixed Fee  
\$ 10,000 Maximum Reimbursed Expenses

## **Executive Summary - Avery Associates**

Avery Associates is a Los Gatos based Management Consulting firm incorporated in 1982. In its proposal Avery states, "We feel exceptionally suited to perform this recruitment on your behalf. . .As a Los Gatos based firm, we also have extensive knowledge into many of the issues and priorities affecting the City of San José."

### **Project Staff**

**Project Leads:** **William Avery** founded the firm in 1981 serving as a chief negotiator, trainer and representative in grievance and disciplinary matters. Mr. Avery expanded the firm to include an increased emphasis on public and private sector search. He has served as City Manager (Los Gatos) and Assistant City Manager. Mr. Avery holds a B.A. in Political Science and MPA from San José State University. **Paul Kimura** has been a recruitment director and HR director for high technology companies such as Novell and National Semiconductor. Mr. Kimura holds a B.S. in Business Administration from San José State University. **Assistance:** **Ann Slate** is a member of the firm's core recruitment team.

### **Recent Recruitments**

Chief Administrative Officer: County of San Bernardino

General Manager: City of Los Angeles Community Development Department

Chief Executive Officer: Los Angeles Community Redevelopment Agency

City Manager: Redding, Union City

Assistant City Manager: Fremont, Bakersfield

### **Recent City of San José Recruitments**

Director: Planning, Building and Code Enforcement

Deputy Director: Retirement Services

Deputy Director, Revenue Management: Finance

Director: Redevelopment Agency

### **Proposed San José City Manager Recruitment Plan**

Position Profile, Organizational Assessment, Stakeholder Outreach

Development of the Search Strategy

Candidate Assessment

Candidate Presentation

Selection Process

Position Closure and Follow-Up

Avery Associates understands the critical importance that the City of San José places on a diverse and comprehensive outreach effort towards identifying the ideal candidate profile. They will develop a final list of outreach meetings with the assistance of City staff and the City Council, including neighborhood associations, various chambers of commerce and business associations, including various ethnic chambers and various regional business associations such as the Downtown and Japantown groups. The goal of these outreach efforts translate into diverse candidate pools.

### **Price**

\$24,900 Fixed Fee

\$ 9,500 Maximum Reimbursed Expenses

EXECUTIVE RECRUITMENT SERVICES

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CITY MANAGER

CITY OF  
SAN JOSE, CA

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**ALLIANCE**  
RESOURCE CONSULTING LLC  
THE POWER OF PARTNERSHIP

October 5, 2006

VIA E-MAIL

CONFIDENTIAL

Members of the Selection Committee  
Arlene Gibbs  
Deputy Director Human Resources  
City of San Jose  
200 East Santa Clara Street  
San Jose, CA 95113-1905

Dear Members of the Selection Committee:

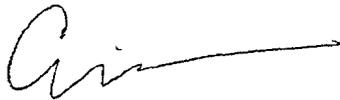
Alliance Resource Consulting is pleased to submit this proposal to assist the City of San Jose in its efforts to recruit and screen candidates for the position of City Manager.

This proposal outlines our general understanding of your requirements and the steps we will take to help accomplish this task. If you desire some modification of our work program, we would be pleased to discuss this with you.

Alliance Resource Consulting is considered the premier public sector executive recruiting firm in the country. Our 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 when our executive search consultants acquired the highly regarded executive search practice of one of the largest public sector consulting/government services companies in the United States. At Alliance Resource Consulting, we are building on the excellent reputation and commitment to service that were the cornerstones of the previous practice. With the innovative use of technology and a commitment to forming enduring partnerships with our clients, Alliance Resource Consulting is committed to setting a new standard for the industry.

We look forward with great interest to again working with you.

Sincerely,



Eric J. Middleton  
Managing Partner



Sherrill Uyeda  
Senior Partner

T H E P O W E R O F P A R T N E R S H I P

ONE WORLD TRADE CENTER, SUITE 420 LONG BEACH, CALIFORNIA 90831 Telephone: (562) 901-0769 Fax: (562) 901-3082  
Website: [www.allianceresourceconsulting.com](http://www.allianceresourceconsulting.com) - E-mail: [info@allianceresourceconsulting.com](mailto:info@allianceresourceconsulting.com)

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# FIRM QUALIFICATIONS

Alliance Resource Consulting is committed to providing our clients with the highest caliber of service in the industry. Our team of dedicated professionals utilizes state-of-the-art technology in conducting a search.

In 2004, Alliance Resource Consulting acquired the national executive recruiting practice of MAXIMUS. With a sizeable staff, Alliance Resource Consulting is able to provide the best possible service to our clients.

We believe we are exceptionally well qualified to assist you. We have extensive experience recruiting City Managers, as well as experience in San Jose. For example, we are currently recruiting your Deputy Director - Wastewater Operations, Deputy Director - Water Operations, and Deputy Director - Watershed Protection. We are currently recruiting the City Administrator for the City of Inglewood (CA) and the Assistant City Manger for the City of Dallas (TX). We recently recruited City Managers for the cities of Alexandria (VA) (2004), Duarte (CA) (2004), El Monte (CA) (2003), Hesperia (CA) (2005), Calexico (CA) (2004), Brunswick (OH), Crystal Lake (IL), City Administrators for the cities of Huntington Beach (CA) (2004), Placentia (CA) (2004), and Millbrae (CA) (2004) and the Assistant City Manager for the City of Irvine (CA) (2006). We have also recently recruited the Assistant County Manager for the Washoe County (NV) (2006). We have also recently recruited your Fire Chief and Deputy Director Retirement Services, Police & Fire Department Retirement Plan. Lists of relevant experience are included in Appendices A and B.

I will be responsible for this assignment and will be assisted by Sherrill Uyeda and Aggie Afarniesh. To accomplish this assignment, we will use the full resources of the firm. Biographies of key consultants can be found in Appendix C, and references can be found in Appendix D.

Our ability to carry out the work required is heavily dependent on our past experience in providing similar services to others, and we expect to continue such work in the future.

We will, however, preserve the confidential nature of any information received from you or developed during the work 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 and our liability, if any, shall not be greater than the amount paid to us for the services rendered.

If selected, we would be pleased to provide you with our firm's Professional Services Agreement.

### Diversity

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 IHM. 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. Recently, we created lists for comparable diversity during recruitments for the City Administrator for the City of Inglewood (CA), the Assistant City Manager for the City of Irvine (CA), the City Manager for the City of Calexico (CA), and the City Manager for the City of Marina (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. Our firm's staff also exemplifies the diversity that we strive to bring to our recruitments. Our staff of consultants includes an Asian American woman, a Mexican American woman, a Persian American woman and an African American woman.

### Stakeholder Outreach

Our firm has used several methods, including stakeholder meetings, community forums and surveys, for stakeholder outreach in a number of previous recruitments. During the recruitment of the City Administrator for the City of Huntington Beach (CA), our lead consultant 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 of Alexandria (VA) City Manager recruitment, our consultants met with the Mayor and each councilperson, conducted a stakeholder forum (2 recommended citizens per council seat), and conducted an online survey for the community. For the City Manager recruitment conducted for the City of Duarte (CA), our 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.

## ADVANTAGES IN UTILIZING OUR SERVICES

Relative to your present search requirements, we believe the principal advantages in using our firm and what may differentiate us from others are:

- Our specialization in public sector executive search on a nationwide basis;
- Our proactive recruitment of candidates who may not be seeking new employment and would not normally respond to routine advertising, or who may come from non-traditional sources;
- Our extensive experience recruiting City Managers;
- Our ability to capitalize on an established network of the most respected executives in the nation;
- Our track record of success in placing senior level executives in particularly sensitive and highly responsible/accountable positions;
- The quality of our work—indicative of this is the fact that most of our clients have utilized our services on more than one occasion, and many have hired our consultants from 5-to-25 times;
- Our familiarity with the City of San Jose from numerous searches conducted there;
- Our team is skilled in the latest techniques to identify prospective candidates and, as a search progresses, to assist in gathering background information on leading candidates;
- Our experience in recruiting and placing candidates from private sector companies into public sector organizations;
- Our proven ability to identify and recommend qualified female and minority candidates;
- Our ability to conduct your assignment in a timely and complete manner;

- Our reputation among clients and candidates for communication (e.g., acknowledgment of resumes, regular reports to the client, face-to-face interviews with candidates); and
- The thoroughness of our documented reference and background checks. We do not merely ask for “five work related references.” Rather, we request very specific references from candidates and, where feasible, gather newspaper articles via the Internet.

# THE RECRUITMENT PROCESS

Our objective is always to find the best qualified candidates. We believe that, although notices in professional journals may be helpful, many of the best candidates must be sought out and their interest encouraged. Our familiarity with the City of San Jose, 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:

- Build consensus among those involved in the hiring process.
- Develop the appropriate specifications for a position.
- Encourage the interest of top-level people who would otherwise be reluctant to respond to an advertisement.
- Preserve the confidentiality of inquiries.
- Save a considerable amount of time for client staff in developing and responding to candidates.
- Independently and objectively assess the qualifications and suitability of candidates for the particular position for which we are recruiting.

If our proposal is accepted, we will do the following:

## Organization and Position Analysis

We will interview the appropriate individuals to determine views of the position and expectations regarding desirable training, experience and personal characteristics of candidates. We will also gather/review relevant updated information about the City, such as budgets, organization charts, etc.

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

### Recruitment

Once you have approved the Recruitment Profile, we will actively seek out individuals with superior qualifications and invite and encourage their interest. Announcements can be placed on-line and in professional journals. However, we will rely heavily on our own experience, contacts and file data.

As a matter of corporate policy, we will 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.

### Preliminary Screening

We will review, acknowledge and evaluate all resumes received. Preliminary screening will be based upon criteria contained in the Recruitment Profile, information contained in the resumes submitted to us, and our knowledge of the people and organizations in which they work. Telephone screening will be conducted with the most promising candidates to gain a better understanding of their backgrounds.

### Progress Reporting

Upon completion of our preliminary screening, we will assemble and submit a progress report of the leading candidates to you. 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 prior to the conclusion of the search and allows us to receive feedback on the caliber of the candidates recruited. In this way, you will not be surprised by the candidates, as you will have seen their qualifications prior to the final interviews. 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.

### Candidate Evaluation

We will interview (either in person or via video-conference) those candidates whose qualifications most closely match the criteria established by you. We will examine their qualifications and achievements in view of the selection criteria. Additionally, we will verify degrees and certifications and gather newspaper articles via the Internet.

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. These references and our evaluations provide you with a frank, objective appraisal of the candidates. We will conduct preliminary references on candidates to be interviewed, and will finalize these for the top one or two candidates.

### Final Reporting/Client Interviews

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 (e.g., information about the organization and the geographic area, budgets, etc.).

We will prepare a brief written report for those candidates most nearly meeting your specifications, and will provide you with 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 conduct a "briefing session" immediately preceding your interviews to make sure that the process flows smoothly, and will assist you in a "debriefing" immediately following the interviews. 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, supplemental written report.

### 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); and
- Notifying unsuccessful candidates, who were not recommended for interview, of the decision.

## 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 to 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; and
- Assist in providing information to candidates that will enable them to make their career decisions.

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.

# TIME FRAME

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

1 <sup>st</sup> week	Meet with the appropriate individuals to gather background information.
2 <sup>nd</sup> to 4 <sup>th</sup> week	Develop and obtain approval for the Recruitment Profile. Develop a list of potential candidates to target. Prepare and place advertisements, if desired.
5 <sup>th</sup> to 8 <sup>th</sup> week	Active recruitment—solicit, receive and acknowledge resumes.
9 <sup>th</sup> week	Evaluate resumes and gather supplemental information.
10 <sup>th</sup> week	Submit progress report and meet with you to review leading candidates.
11 <sup>th</sup> to 12 <sup>th</sup> week	Verify degrees and certifications, conduct preliminary references and interview the best qualified candidates.
13 <sup>th</sup> week	Submit final report and initiate the interview process with you.
Following Interviews	Finalize references, conduct credit/criminal/civil litigation/motor vehicle record checks, and assist with negotiations.

# PROFESSIONAL FEES AND EXPENSES

Our budget provides for up to three meetings with the client: one to develop the Recruitment Profile, one to present our Progress Report, and one to attend interviews of final candidates. We propose a fixed fee of \$20,000 for the work outlined above. In addition, we are reimbursed for expenses such as for advertising, travel, interviewing, sourcing, support services, background checks and other related items, as well as allocated costs such as telephone, postage and photocopying. These expenses will not exceed \$10,000 for a nationwide search without written authorization from you. Please note that this amount for expenses 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. We will submit three equal monthly invoices for fees, plus an amount for expenses, due and payable upon receipt. Our first billing is due upon your authorization to proceed.

Though we are committed to working with you until a placement is made, our fees and expenses are not contingent upon our success in placing a candidate with your organization. However, if the selected candidate (if recommended by us for hire, and other than an internal candidate) should be terminated within one year from the date of hire, we will redo the search for no additional professional fee. Naturally, we would expect to be reimbursed for any expenses that might be incurred. Additionally, in the event that more than one executive is hired in connection with work performed by us (i.e., for another position within your organization), a negotiated fee will be due for each additional executive hired.

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.

# APPENDIX-A

## CHIEF EXECUTIVE SEARCHES FOR GENERAL PURPOSE LOCAL GOVERNMENTS CONDUCTED BY ALLIANCE RESOURCE CONSULTING\*

### ALABAMA, STATE OF

Anniston, City of	City Manager
Bay Minette, City of	City Administrator

### ALASKA, STATE OF

Juneau, Borough of	Borough Manager
Ketchikan, City of	City Manager
Ketchikan-Gateway, Borough of	Borough Manager
Valdez, City of	City Manager

### ARIZONA, STATE OF

Apache Junction, City of	City Manager
Casa Grande, City of	City Manager
Coconino County	County Manager
Glendale, City of	City Manager
Maricopa County	County Administrative Officer
Mesa, City of	City Manager
Paradise Valley, Town of	Town Manager
Phoenix, City of	City Manager
Pima County	County Manager
Prescott, City of	City Manager

Scottsdale, City of  
Tucson, City of

City Manager  
City Manager

## ARKANSAS, STATE OF

Little Rock, City of

City Manager

## CALIFORNIA, STATE OF

Alameda, City of  
Alameda County  
Albany, City of  
Anaheim, City of  
Arcadia, City of  
Atascadero, City of  
Atherton, City of  
Bakersfield, City of  
Baldwin Park, City of  
Bell, City of  
Belmont, City of  
Berkeley, City of  
Beverly Hills, City of  
Big Bear Lake, City of  
Blythe, City of  
Brea, City of  
Buellton, City of  
Buena Park, City of  
Burbank, City of  
Butte County  
Calexico, City of  
Calistoga, City of  
Camarillo, City of  
Campbell, City of  
Carmel-by-the-Sea, City of  
Carson, City of  
Cathedral City, City of  
Chino Hills, City of  
Citrus Heights, City of  
Coachella, City of

City Manager  
County Administrator  
City Administrator  
City Manager  
City Administrative Officer  
City Manager  
County Administrative Officer  
City Manager  
City Administrator  
City Manager  
City Manager  
City Manager  
City Manager

Concord, City of	City Manager
Contra Costa County	County Administrator
Corona, City of	City Manager
Coronado, City of	City Manager
Corte Madera, Town of	Town Manager
Culver City, City of	Chief Administrative Officer
Cypress, City of	City Manager
Dana Point, City of	City Manager
Del Mar, City of	City Manager
Desert Hot Springs, City of	City Manager
Diamond Bar, City of	City Manager
Duarte, City of	City Manager
East Palo Alto, City of	City Manager
El Cajon, City of	City Manager
El Dorado County	Chief Administrative Officer
El Segundo, City of	City Manager
Encinitas, City of	City Manager
Fairfield, City of	City Manager
Fontana, City of	City Manager
Fresno, City of	City Manager
Fresno County	County Administrative Officer
Fullerton, City of	City Manager
Galt, City of	City Manager
Glendale, City of	City Manager
Glendora, City of	City Manager
Grover Beach, City of	City Administrator
Hanford, City of	City Manager
Hawthorne, City of	City Manager
Hemet, City of	City Manager
Hercules, City of	City Manager
Hesperia, City of	City Manager
Hidden Hills, City of	City Manager
Humboldt County	Chief Administrative Officer
Huntington Beach, City of	City Administrator
Indio, City of	City Manager
Inglewood, City of	City Administrator
Irwindale, City of	City Manager

King City, City of	City Manager
La Quinta, City of	City Manager
Laguna Hills, City of	City Manager
Laguna Niguel, City of	City Manager
Lathrop, City of	City Manager
Lawndale, City of	City Manager
Lincoln, City of	City Administrator
Livermore, City of	City Manager
Lomita, City of	City Administrator
Long Beach, City of	City Manager
Los Alamitos, City of	City Manager
Los Altos Hills, Town of	City Manager
Los Angeles County	Chief Administrative Officer
Malibu, City of	City Manager
Mammoth Lakes, Town of	Town Manager
Marin County	County Administrator
Marina, City of	City Manager
Mariposa County	County Administrative Officer
Martinez, City of	City Manager
Marysville, City of	City Administrator
Menlo Park, City of	City Manager
Millbrae, City of	City Administrator
Milpitas, City of	City Manager
Modesto, City of	City Manager
Monrovia, City of	City Manager
Monterey County	County Administrator
Monterey Park, City of	City Manager
Moreno Valley, City of	City Manager
Morgan Hill, City of	City Manager
Mountain View, City of	City Manager
Needles, City of	City Manager
Nevada County	County Administrator
Norco, City of	City Manager
Novato, City of	City Manager
Oakland, City of	City Manager
Ontario, City of	City Manager
Orange, City of	City Manager

Orinda, City of	City Manager
Oxnard, City of	City Manager
Palm Springs, City of	City Manager
Palo Alto, City of	City Manager
Park City, City of	City Manager
Paso Robles, City of	City Manager
Piedmont, City of	City Administrator
Pittsburg, City of	City Manager
Placentia, City of	City Administrator
Pleasanton, City of	City Manager
Pomona, City of	City Manager
Porterville, City of	City Manager
Rancho Palo Verdes, City of	City Manager
Redding, City of	City Manager
Redlands, City of	City Manager
Redondo Beach, City of	City Manager
Redwood City, City of	City Manager
Ridgecrest, City of	City Administrator
Riverside, City of	City Manager
Riverside County	County Administrative Officer
Rolling Hills, City of	City Manager
Sacramento County	County Executive
Salinas, City of	City Manager
San Buenaventura, City of	City Manager
San Clemente, City of	City Manager
San Diego, City of	City Manager
San Diego County	County Manager
San Fernando, City of	City Administrative Officer
San Gabriel, City of	City Manager
San Jacinto, City of	City Manager
San Joaquin County	County Administrator
San Jose, City of	City Manager
San Luis Obispo County	County Administrative Officer
San Mateo County	County Manager
Santa Ana, City of	City Manager
Santa Clarita, City of	City Manager
Santa Monica, City of	City Manager

Selma, City of	City Manager
Shasta County	County Administrative Officer
Signal Hill, City of	City Manager
Solvang, City of	City Administrative Officer
Sonoma County	County Administrator
South Lake Tahoe, City of	City Manager
South Pasadena, City of	City Manager
South San Francisco, City of	City Manager
Stanton, City of	City Manager
Sunnyvale, City of	City Manager
Tehachapi, City of	City Manager
Temecula, City of	City Manager
Thousand Oaks, City of	City Manager
Tracy, City of	City Manager
Truckee, City of	City Manager
Tulare, City of	City Manager
Tulare County	County Executive
Turlock, City of	City Manager
Vallejo, City of	City Manager
Ventura County	Chief Administrative Officer
Visalia, City of	City Manager
Vista, City of	City Manager
Walnut, City of	City Manager
Walnut Creek, City of	City Manager
West Covina, City of	City Manager
West Hollywood, City of	City Manager
Westminster, City of	City Manager
Whittier, City of	City Manager
Woodland, City of	City Manager
Yorba Linda, City of	City Manager
Yucaipa, City of	City Manager

## COLORADO, STATE OF

Arapahoe County	County Administrator
Aurora, City of	City Manager
Avon, City of	City Manager
Boulder, City of	City Manager

Commerce City, City of	City Manager
Estes Park, Town of	Town Administrator
Grand Junction, City of	City Manager
Greenwood Village, City of	City Manager
Lakewood, City of	City Administrative Officer
Longmont, City of	City Manager
Northglenn, City of	City Manager

## COLUMBIA, DISTRICT OF

District of Columbia

City Administrator/Deputy Mayor  
for Operations  
Chief Management Officer

District of Columbia Financial  
Responsibility & Management  
Assistance Authority

## CONNECTICUT, STATE OF

Hartford, City of  
Meriden, City of  
West Hartford, Town of

City Manager  
City Manager  
Town Manager

## DELAWARE, STATE OF

Dover, City of

City Manager

## FLORIDA, STATE OF

Alachua County  
Bay County  
Boynton Beach, City of  
Clearwater, City of  
Fort Lauderdale, City of  
Gainesville, City of  
Hillsborough County  
Jupiter, Town of  
Key Biscayne, Village of  
Lee County  
Marion County  
Miami, City of

County Manager  
County Administrator  
City Manager  
City Manager  
City Manager\*\*  
City Manager  
County Administrator  
Town Manager  
Village Manager  
County Administrator  
County Administrator  
City Manager

Miami Beach, City of	City Manager
Miami—Dade County	County Manager
Naples, City of	City Manager
Ocala, City of	City Manager
Palm Beach, Town of	Town Manager
Pensacola, City of	City Manager
Riviera Beach, City of	City Manager
Safety Harbor, City of	City Manager
Sarasota, City of	City Manager
Sarasota County	County Administrator
St. Petersburg, City of	City Manager

## GEORGIA, STATE OF

Albany, City of	City Manager
Fulton County	County Manager
Lowndes County	County Manager

## ILLINOIS, STATE OF

Crystal Lake, City of	City Manager
Des Plaines, City of	City Manager
Downers Grove, Village of	Village Manager
DuPage County	County Administrator
Elgin, City of	City Manager
Flossmoor, Village of	Village Manager
Hazel Crest, Village of	Village Manager
McHenry, City of	City Administrator
Mount Prospect, Village of	Village Manager
Naperville, City of	City Manager
Peoria, City of	City Manager
Rock Island, City of	City Manager
Skokie, Village of	Village Manager
Sterling, City of	City Manager
Streamwood, Village of	Village Administrator
Villa Park, Village of	Village Manager
Wood River, City of	City Manager

IOWA, STATE OF

Ames, City of  
Sioux City, City of

City Manager  
City Manager

KANSAS, STATE OF

Emporia, City of  
Sedgwick County  
Wichita, City of

City Manager  
County Administrator  
City Manager

MAINE, STATE OF

Bangor, City of  
Lewiston, City of

City Manager  
City Administrator

MARYLAND, STATE OF

Columbia Association, The  
Prince George's County  
Rockville, City of

President/Chief Executive Officer  
Chief Administrative Officer  
City Manager

MICHIGAN, STATE OF

Ann Arbor, City of  
Bay City, City of  
Berkley, City of  
Branch County  
Essexville, City of  
Grand Rapids, City of  
Kalamazoo, City of  
Kalamazoo County  
Saginaw, City of  
Sandstone, City of  
St. Joseph, City of  
Washtenaw County  
Ypsilanti, City of

City Administrator  
City Manager  
City Manager  
County Manager  
City Manager  
City Manager  
City Manager  
County Administrator  
City Manager  
City Manager  
City Manager  
County Administrator  
City Manager

MINNESOTA, STATE OF

Brooklyn Park, City of  
Coon Rapids, City of

City Manager  
City Manager

Minneapolis, City of  
Ramsey County  
Sandstone, City of  
St. Louis Park, City of

City Coordinator  
County Executive  
City Administrator  
City Manager

## MISSOURI, STATE OF

Branson, City of  
Columbia, City of  
Kansas City, City of  
St. Charles, City of

City Administrator  
City Manager  
City Manager  
City Administrator

## MONTANA, STATE OF

Great Falls, City of

City Manager

## NEVADA, STATE OF

Las Vegas, City of  
North Las Vegas, City of

City Manager  
City Manager

## NEW JERSEY, STATE OF

Plainsboro Township

Village Administrator

## NEW MEXICO, STATE OF

Los Alamos County

County Administrator

## NEW YORK, STATE OF

Garden City, Village of  
Scarsdale, Village of

Village Manager  
Village Manager

## NORTH CAROLINA, STATE OF

Charlotte, City of  
Gaston County  
Winston-Salem, City of

City Manager  
County Manager  
City Manager

## OHIO, STATE OF

Brunswick, City of  
Cincinnati, City of

City Manager  
City Manager

## OKLAHOMA, STATE OF

Bartlesville, City of	City Manager
Edmond, City of	City Manager
Enid, City of	City Manager
Mustang, City of	City Manager

## OREGON, STATE OF

Ashland, City of	City Administrator
Astoria, City of	City Manager
Coos Bay, City of	City Manager
Corvallis, City of	City Manager
Eugene, City of	City Manager
Grants Pass, City of	City Manager
Lake Oswego, City of	City Manager
Lane County	County Administrator
Medford, City of	City Manager
Milwaukie City of	City Manager
Ontario, City of	City Manager
Pendleton, City of	City Manager
Redmond, City of	City Manager
Roseburg, City of	City Manager
Salem, City of	City Manager
Tualatin, City of	City Manager
Wilsonville, City of	City Manager

## SOUTH CAROLINA, STATE OF

Greenville, City of	City Manager
Myrtle Beach, City of	City Manager

## TEXAS, STATE OF

Austin, City of	City Manager
Bellaire, City of	City Manager
Brownsville, City of	City Manager
Bryan, City of	City Manager
Carrollton, City of	City Manager
Cedar Park, City of	City Manager

Cleburne, City of	City Manager
Corpus Christi, City of	City Manager
Dallas, City of	City Manager
Edna, City of	City Manager
El Paso, City of	Chief Administrative Officer
Gaston County	County Manager
Georgetown, City of	City Manager
Grapevine, City of	City Manager
Longview, City of	City Manager
Orange, City of	City Manager
San Antonio, City of	City Manager
West University Place, City of	City Manager
Woodlands Community Service Corporation, The	President/Chief Executive Officer

## UTAH, STATE OF

Park City, City of	City Manager
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## VIRGINIA, STATE OF

Alexandria, City of	City Manager
Arlington County	County Manager
Chesapeake, City of	City Manager
Chesterfield County	County Administrator
Fairfax County	County Executive
Richmond, City of	City Manager
Virginia Beach, City of	City Manager

## WASHINGTON, STATE OF

Bellevue, City of	City Manager
Kirkland, City of	City Manager
Normandy Park, City of	City Manager
Vancouver, City of	City Manager

WISCONSIN, STATE OF

Barron County  
Coordinator

Administrative Services

Fond du Lac, City of

City Manager

Muskego, City of

City Manager

Portage, City of

City Manager

WYOMING, STATE OF

Casper, City of

City Manager

Jackson, City of

Town Administrator

Laramie, City of

City Manager

\*Some searches were conducted by Alliance Resource Consulting when it was known as MAXIMUS Executive Search.

\*\*Searches in which we assisted with the recruitment process.

5/3/2006

# APPENDIX-B

## SAN FRANCISCO BAY AREA (CA)

### CLIENTS OF ALLIANCE RESOURCE

### CONSULTING\*

Alameda, City of  
Alameda County  
Alameda County Flood Control  
District  
Alameda-Contra Costa Transit  
District  
Albany, City of  
Antioch, City of  
Atherton, City of  
Bay Area Air Quality Management  
District  
Bay Area Rapid Transit District  
Belmont, City of  
Berkeley, City of  
Brisbane, City of  
California Advantage  
California Pacific Medical Center  
Research Institute  
Campbell, City of  
Central Contra Costa Sanitation  
District  
Central Contra Costa Transit  
Authority  
Clayton, City of

Concord, City of  
Contra Costa County  
Contra Costa Water District  
Corte Madera, City of  
Delta Diablo Sanitation District  
Dublin, City of  
Dublin San Ramon Services District  
East Bay Dischargers Authority  
East Bay Regional Park District  
East Palo Alto, City of  
El Cerrito, City of  
Emeryville, City of  
Family Service Agency of San Mateo  
County  
Fremont, City of  
Golden Gate Bridge, Highway and  
Transportation District  
Hayward, City of  
Hello Direct Inc.  
Hercules, City of  
Livermore, City of  
Livermore-Amador Valley Water  
Management Agency  
Los Altos Hills, Town of

Los Altos, City of  
Los Gatos, City of  
Marin Community Foundation  
Marin County  
Marin Municipal Water District  
Martinez, City of  
Menlo Park, City of  
Milpitas, City of  
Morgan Hill, City of  
Mountain View, City of  
Newark, City of  
Novato, City of  
Oakland, City of  
Oakland, Port of  
Orinda, City of  
Oro Loma Sanitary District  
Pacific Vascular Research  
Foundation  
Palo Alto, City of  
Piedmont, City of  
Pittsburg, City of  
Pleasanton, City of  
Project Open Hand  
Public Financial Management, Inc.  
Redwood City, City of  
Richmond, City of  
San Anselmo, Town of  
San Carlos, City of  
San Francisco Public Utilities  
Commission  
San Jose, City of  
San Jose Redevelopment Agency  
San Lorenzo Valley Water District  
San Mateo, City of  
San Mateo County  
San Pablo, City of  
San Rafael, City of  
Santa Clara, City of

Santa Clara County  
Santa Clara County Social Services  
Agency  
Santa Clara Valley Transportation  
Authority  
Sausalito, City of  
Sequoia Institute  
South San Francisco, City of  
Sunnyvale, City of  
Union City, City of  
University of California, San  
Francisco  
U.S. Communities  
Walnut Creek, City of

# APPENDIX—C

## BIOGRAPHIES

### ➤ ERIC J. MIDDLETON – MANAGING PARTNER

Eric Middleton began his career in executive search in 1999 with MAXIMUS. He is currently a founding partner and Vice President of Alliance Resource Consulting LLC. Prior to his career in executive search, Mr. Middleton spent 13 years with the County of Los Angeles and the City of Los Angeles. During his tenure with Los Angeles County, Mr. Middleton held various positions with the Chief Administrative Office, the County Sheriff, the Office of the District Attorney, the Department of Public Works and the Probation Department. While with the Probation Department, Mr. Middleton was instrumental in drafting legislation creating the 1996 Repeat Offender Prevention Project (AB 2447) an intervention and prevention program targeting at-risk youth. Immediately prior to joining MAXIMUS, he was the Senior Legislative Deputy to a Los Angeles City Council Member responsible for oversight of the City's public safety and social service programs. Mr. Middleton also served as the senior staff member to the City of Los Angeles Public Safety Committee. Mr. Middleton has also served as a member of the Los Angeles County Bar Association Juvenile Court Task Force, as legislative staff to the Chief Probation Officers of California, and as a community member of the Public Safety Advisory Committee to Assembly Member Robert Hertzberg. In 1993, Mr. Middleton was recognized as a Los Angeles County Volunteer of the Year for his civic involvement. Mr. Middleton is currently a Vice President of the Los Angeles Metropolitan Chapter of the American Society for Public Administration (ASPA).

Mr. Middleton has been engaged in over 200 recruitments in most areas of general local government (e.g., Public Safety, Community and Economic Development, Social Services, Public Works, Finance, etc.), as well as Pension and Retirement system searches for the Arizona State Retirement System, Fresno County (CA), Santa Barbara County (CA), Kern County (CA), and the Washington State Investment Board (WA). Mr. Middleton has also conducted numerous City Manager recruitments, including the California cities of Yorba Linda, Diamond Bar, Redlands, West Hollywood, Martinez, Marina, Millbrae, Duarte and Huntington Beach. Mr. Middleton has also recruited Police Chiefs for the City of Chicago (IL), Glendale (CA), San Diego (CA), and San Jose (CA).

Mr. Middleton received a Bachelor of Arts degree in History from California State University at Northridge, and a Master of Public Administration degree from the University of Southern California.

### ➤ SHERRILL A. UYEDA – SENIOR PARTNER

Sherrill Uyeda began her career in executive search in 1998 with Norman Roberts & Associates, Inc., which was acquired by MAXIMUS in 1999. She is currently a founding partner of Alliance Resource Consulting LLC. Ms. Uyeda has over 7 years of public sector executive search experience and has completed over 275 recruitments. Ms. Uyeda's professional recruitment background covers all areas of public sector executive search, including city, state, and regional government with a successful track record of executive placements. She is experienced in recruiting in the fields of public utilities, public works, planning, medical, redevelopment, library, recreation, finance, human and social services, airports and port authorities. Past nationwide clients have included the Metropolitan Water District, District of Columbia Water and Sewer Authority, San Antonio Water System, Bay Area Rapid Transit District, Los Angeles World Airports, New Orleans International Airport, Nashville International Airport and Broward County, FL Department of Aviation.

Prior to her executive search experience, Ms. Uyeda worked for Burson-Marsteller. While at Burson-Marsteller, she worked within the Corporate Practice which focused on global perception management. She specialized in corporate communications and strategic positioning for companies such as Sony Pictures Entertainment and Gulfstream Netjets.

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 currently a member of the Los Angeles Junior Chamber of Commerce, American Society for Public Administrators and USC's Town and Gown.

## ➤ AGGIE AFARINESH – CONSULTANT

Aggie Afarinesh began her career in executive search in 2003 with MAXIMUS. Her experience with public sector executive search includes work with general purpose local governments, including city management, redevelopment agencies, water districts, transportation departments, and nonprofit agencies. Ms. Afarinesh's assignments include recruitments for the Assistant City Manager for the City of Irvine, CA, Assistant County Manager for the Washoe County, NV, Administrative Services Director for the City of Lomita, CA, Information Technology Director for the Yorba Linda Water District, CA and General Manager for the Tuolumne Utilities District, CA. She has managed Recreation and Parks recruitments for the cities of West Covina, CA, El Segundo, CA and Morgan Hill, CA and Washoe County, NV. Ms. Afarinesh has also assisted clients in the area of personnel reorganization to help achieve greater efficiency and effectiveness.

Prior to joining Alliance Resource Consulting, Ms. Afarinesh worked for the University of Southern California in the Office of External Relations, working with local government and community leaders to develop programs benefiting the University and its neighbors. Ms. Afarinesh has

also worked for the City of Downey Fire and Finance departments and the City of Los Angeles, Community Redevelopment Agency.

Ms. Afarinesh is a graduate of the University of Southern California, with a Bachelor of Science in Public Policy and Management (Cum Laude) and a Master of Public Administration (Dean's Merit Scholar). Ms. Afarinesh founded the Student and Professional Development Committee for the Metropolitan Los Angeles American Society for Public Administration chapter (ASPA), and is an active alumni member of the USC Graduate Policy and Administration Community (GPAC). She is also a member of the California Redevelopment Association, International Economic Development Council and Municipal Management Association of Southern California (MMASC).

# APPENDIX-D

## REFERENCES

**CLIENT:** City of Huntington Beach, CA  
**CONTACT: Name:** Jill Hardy  
**Title:** Mayor  
**Phone #:** (714) 536-5553

**CLIENT:** City of Irvine  
**CONTACT: Name:** Sean Joyce  
**Title:** City Manager  
**Phone #:** (949) 724-6246

**CLIENT:** City of Duarte, CA  
**CONTACT: Name:** Margaret Finley  
**Title:** Mayor  
**Phone #:** (626) 357-7931

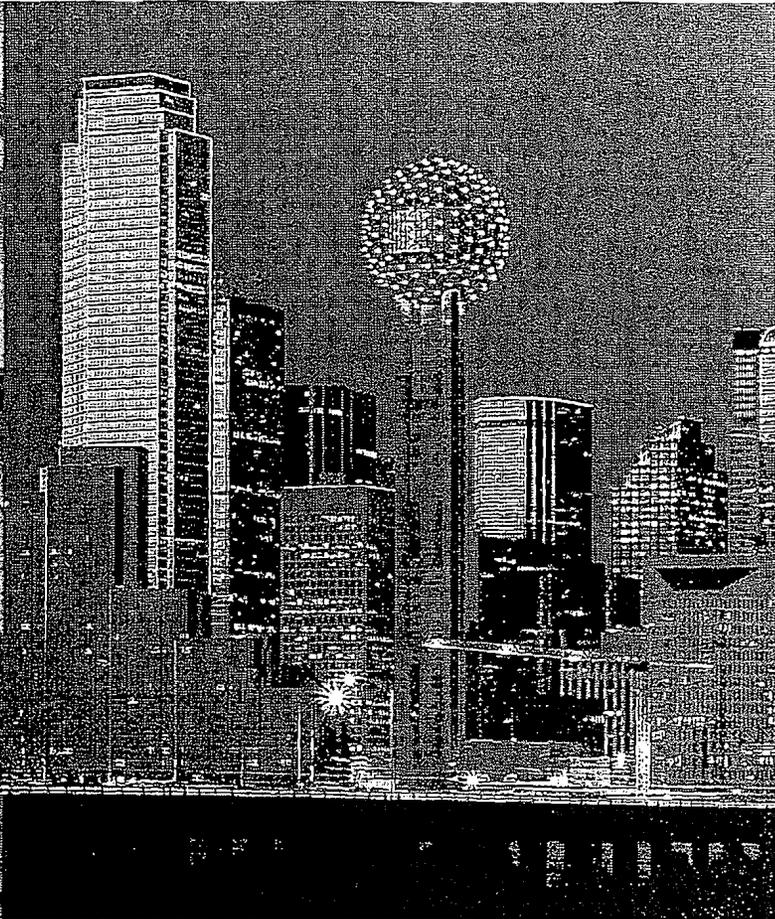
**CLIENT:** City of Alexandria, VA  
**CONTACT: Name:** William Euille  
**Title:** Mayor  
**Phone #:** (703) 838-4500

**CLIENT:** City of Placentia, CA  
**CONTACT: Name:** Judy Dickinson  
**Title:** Mayor  
**Phone #:** (714) 993-8117

**CLIENT:** Washoe County, NV  
**CONTACT: Name:** Joanne Ray  
**Title:** Human Resources Director  
**Phone #:** (775) 328-2089

# CITY OF DALLAS, TEXAS

## Assistant City Manager



  
**ALLIANCE**  
RESOURCE CONSULTING LLC

THE POWER OF PARTNERSHIP

# CITY OF DALLAS, TEXAS

## Assistant City Manager

### The City

The City of Dallas is an array of imagination, talent and first-class attractions. A place so full of diversity, it offers something virtually for everyone. From museums, theatre and music venues to major league sports, the City of Dallas can offer visitors, natives and new residents something dazzling, dynamic and down-home all rolled into one.

A place of exciting beginnings, Dallas is where a young person can launch a career and meet new friends and where the young at heart can thrive, furthering established careers, raise their family and pursue new life interests. Regardless of a person's career choice or lifestyle, Dallas is accommodating, comfortable and attractive for people of all nationalities and cultures. With a population of 1.2 million, Dallas is the ninth largest city in the U.S. and is located at the center of a thriving area in North Central Texas on a total land area of 384 square miles.

The number one visitor destination in Texas, Dallas is served by an excellent ground-based and air-based transportation network that feeds the region's economic activities. DFW International Airport is the nation's third busiest, handling more than 60 million passengers, and is served by all major national and international airlines. Love Field also serves the Dallas area with scheduled passenger services, as well as corporate flight services.

On the ground, the Dallas-area freeway system provides numerous east-west and north-south corridors with many major highways intersecting within the City, providing direct routes to other major Texas population centers. If driving is not for you, Dallas Area Rapid Transit (DART) provides public transportation around Dallas and 12 suburbs, operating light rail and commuter rail services, as well as buses and vans.

DFW's over-all cost of living is 7.4 percent below the national average. Additionally, housing costs are 23.1 percent lower and food cost are 3.3 percent lower than the national average, Dallas brings together an ideal

location, state-of-the-art resources and a region filled with arts and entertainment. New buildings, new businesses and new people continually renew and reinvent this energetic, successful city making Dallas the place where the opportunities are boundless and limited only by the imagination.

For more information about Dallas, visit the City's website at [www.dallascityhall.com](http://www.dallascityhall.com) or the Greater Dallas Chamber of Commerce's website at [www.gdc.org](http://www.gdc.org).

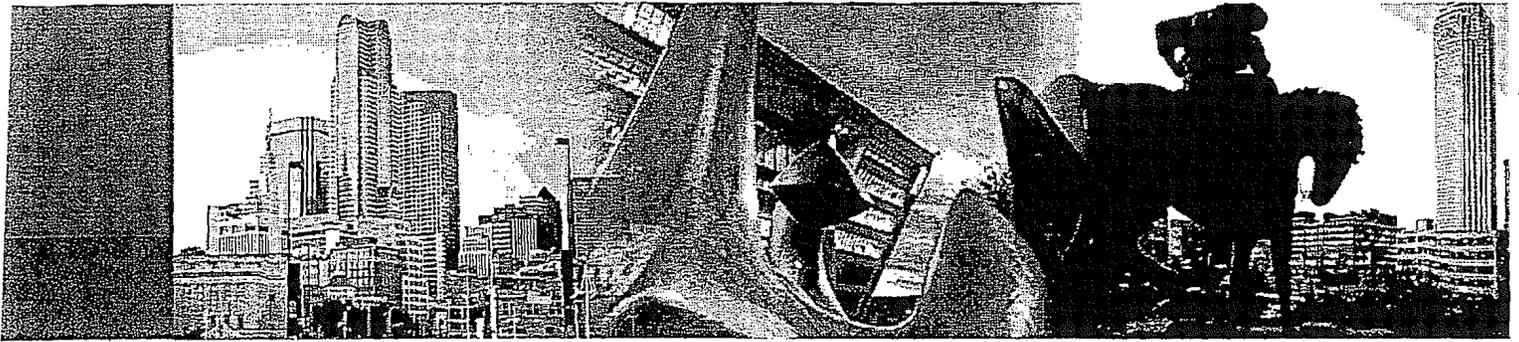
### The Government

For many years Dallas has been recognized as a national model for effective professional management of a large and complex city organization. Currently, the City operates under the Council-Manager form of government that includes 14-members and the Mayor. Council Members are elected from single-member districts for two-year terms and can serve up to four consecutive terms while the Mayor is elected at large for a four-year term with the limit of two consecutive terms.

The Council-Manager form of government combines citizen input through elected Council Members with the training and experience of a career City Manager who implements policies set by the Council and is responsible for the direction of the day-to-day affairs of the City. The City Manager oversees City operations with an executive team of five Assistant City Managers (ACM), each of whom has oversight responsibility for various City departments. Departmental operations and services are under the day-to-day supervision of professionally-trained Department Heads. The City of Dallas is a self-sufficient, full-service City with a \$2 billion annual budget which includes \$1.7 billion in operating funds and \$.46 billion in capital funds and an employee workforce of about 12,500 FTEs.

### The Position

The new Assistant City Manager will join a team of four other ACMs and assume a critical role in the



# anager

Senior Management ranks of the City. The mission of this ACM's position is to provide quality integrated professional management, leadership, oversight, coordination and support of high value to City departments and employees. This ACM will serve as an extension of the City Manager and be responsible for achieving Council goals in a manner that promotes value in return for taxpayers' monies with a strong customer service orientation.

The City Manager will expect the new ACM to play an active role during the first twelve to eighteen months of employment by guiding departments to accomplish their goals related to the following top five priorities established in January 2004 and reaffirmed in 2005 by the City Council.

## *Priorities*

- Economic Development
- Staff Accountability
- Neighborhood Quality
- Public Safety
- Trinity River Project

The new ACM will initially focus on staff accountability. The ACM's charge will be challenging and complex, but simply put, they will develop and administer the systems and processes necessary to deliver public policies and public services of the highest quality for the City of Dallas.

## **The Candidate**

### *Education, Qualifications and Experience*

- Candidates must possess ten or more years of progressive experience at the senior level and a bachelor's degree from an accredited college or university (a master's degree is highly preferred).
- The ideal candidate will be a well-rounded executive with extensive knowledge in all areas of municipal operations including finance, economic development, public relations, enterprise operations, public safety and planning.

Candidates must also demonstrate the qualities listed below:

- Must demonstrate the ability to manage several internal departments and employees to ensure objectives with external consultants, developers, and other governmental agencies are being met.
- Must have outstanding senior management skills and a successful record of achievement.
- Must have a reputation as an open-minded, forward thinking, innovative and creative problem solver.
- Must be politically astute.
- Must have excellent planning and organizational skills.
- Must have a track record of absolute integrity and honesty in professional and personal matters.
- Must have comprehensive skills using the Microsoft Office suite.

It is strongly preferred that the selected candidate be bilingual. Also, candidates from both the public and private sector will be considered. Candidates who are committed to the "Leadership ICMA" are encouraged to apply.

### *Management Style and Personal Traits*

The ideal candidate will have strong local government experience managing a diverse staff in a multi-cultural environment of at least 250,000 citizens. In addition, the selected candidate will be:

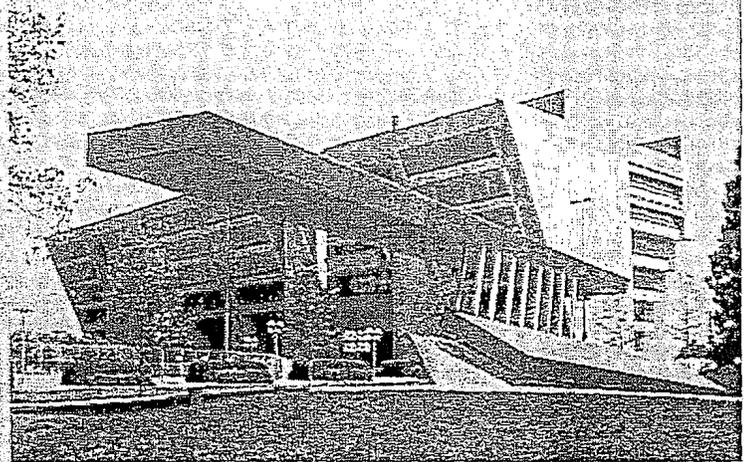
- Someone who listens;
- Creative and innovative;
- A person with a strong strength of character with no ego;
- A hard worker who is fast-paced and able to work independently;
- Someone who is loyal, honest, and watches out for others;
- A team player with a participatory style of management;
- Professional;

- Energetic;
- Committed to the organization;
- Someone who takes initiative;
- Someone who is ethical and trustworthy;
- A person who enjoys professional challenges;
- Intelligent
- Able to hit the ground running;
- A strong communicator who keeps everyone "in the loop" and seeks out other people's opinion;
- Someone who has an orientation towards customer service and is able to guide the departments to it; and
- Someone who cares about the environment and values the environmental quality issues.

## Compensation

The salary for this position is open (within an established range), and will be dependent upon the qualifications and experience of the selected candidate. In addition, benefits are provided which include:

- **Health Benefits** – The City of Dallas offers a health benefits package that begins on the first day of employment. Seven basic options are available: United Healthcare 80/20 PPO with a \$500, \$1000 or \$3000 deductible or United Healthcare 70/30 PPO with a \$300, \$1000 or \$3000 deductible, and Blue Cross Blue Shield HMO. A variety of dependent coverage options is available.
- **Life Insurance and Optional Benefits** – The City of Dallas provides \$40,000 of life insurance, with the option to purchase additional coverage for the employee and dependents. In addition to life insurance, the City of Dallas also offers: Accidental Death & Dismemberment, Dental Care, Vision Care, Pre-paid Legal Services and Long-Term Care.
- **Deferred Compensation and Retirement Fund** – There are two deferred compensation plans, a 401K and a 457 plan. Both plans are administered by Fidelity. The City of Dallas also has its own defined benefit retirement fund to which both the employee and the City contribute. The employee's contribution is 9.03% with a City match of 15.38% of salary. The City of Dallas does not participate in Social Security.



- **Holidays** – The City of Dallas offers nine paid holidays per year.
- **Vacation and Sick Leave** – Length of service determines vacation days earned. For the first five years, employees earn 13 days per year. For years 5-9, employees earn 15 days per year. Employees earn 12 days of sick leave per year.
- **Moving Expenses** – The City of Dallas covers the cost of temporary housing and moving expenses for executives who relocate.

## How To Apply

Please apply on-line by as soon as possible at [www.allianceresourceconsulting.com](http://www.allianceresourceconsulting.com). This position will be open until filled. Candidate profile review starts June 2, 2006.

For questions and inquiries, please contact:

Sherrill A. Uyeda, *Senior Partner* or  
Eric J. Middleton, *Managing Partner*

### ALLIANCE RESOURCE CONSULTING LLC

One World Trade Center, Suite 420  
Long Beach, CA 90831

Telephone: (562) 901-0769

E-mail: [apply@allianceresourceconsulting.com](mailto:apply@allianceresourceconsulting.com)

*An Equal Opportunity/ADA Employer*

*Female and Minority Candidates are Strongly Encouraged to Apply.*

**IN ACCORDANCE WITH THE TEXAS PUBLIC INFORMATION ACT, RESUMES MAY BE SUBJECT TO PUBLIC DISCLOSURE.**



**AVERY**  
a s s o c i a t e s

Los Gatos

Santa Cruz ♦ San Luis Obispo ♦ Bend,

September 26, 2006

Arlene Gibbs, Deputy Director Employee Services  
City of San José  
200 East Santa Clara Street  
San José, CA 95113

Dear Arlene:

Thank you for the opportunity to submit our proposal for the recruitment of a new City Manager for the City of San José. We take great pride in providing our clients exceptional service and excellent results.

We feel exceptionally suited to perform this recruitment on your behalf. Over the years we've had extensive interaction with City Managers based on our successful Labor Relations and Executive Search practices. Previous executive level recruitments for City Managers (which are listed in our proposal) and GM/CEOs, have also allowed us to create an extensive and current database of potential candidates for this role. We also completed the national recruitment for the City's Executive Director of the Redevelopment Agency approximately 18 months ago and are nearing completion of several other executive recruitments for the City currently.

As a Los Gatos based firm, we also have extensive knowledge into many of the issues and priorities affecting the City of San José. Paul Kimura and I are long time area residents and we both graduated from San José State University. Our history here provides us with direct experiences that are valuable in representing San José to prospective candidates. This knowledge and insight of the City of San José and the general metropolitan area is especially important during outreach efforts and in closing with the chosen candidate.

Following your review of this proposal, we hope our credentials will provide the basis for your positive consideration of our firm. Enclosed you will find the following information:

- Company Profile and Firm Qualifications
- Recruitment Work Plan
- Consulting Fee, Billing Assignment and Guarantees & Ethics
- Recruitment Timeline
- Profiles on Principals of the Firm
- Client References

William Avery & Associates, Inc.  
Labor Relations/Executive Search

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

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

Sincerely,

William H. Avery

WHA:jmc



## PROPOSAL FOR THE CITY OF SAN JOSÉ RECRUITMENT FOR THE NEW CITY MANAGER

### Avery Associates - Profile

Avery Associates is a Los Gatos, California based Management Consulting firm incorporated in 1982. We specialize in Executive Search and Human Resources/Management Consulting. Our firm currently has two Principals and several key Consultants. Bill Avery heads the Firm and the Management/Labor Relations practice in addition to leading key searches: Paul Kimura is the Principal who oversees the Search and Recruitment practice. Ann Slate, Cris Piasecki and Gary Rogers form the core recruitment team for the firm. Jackie Collins, Leah Jakusovszky and Canela Bermea handle administrative support.

We offer a unique recruitment service as the background and capabilities of our firm Consultants gives us the ability to provide recruitment services that positively differentiates us from other strictly public sector search firms. We do so by incorporating private sector search methodologies into our public sector recruitment process, and combining "best" practices from each of the sectors in which we operate.

### Firm Qualifications

The majority of the recruitment activity is completed by our firm Principals. This hands-on involvement includes client interface, development of position profile and announcement, candidate identification, interviewing and assessment, candidate presentation, facilitation of the final interview process, and if desired, assistance in negotiating the offer of employment with the selected candidate. Among the city management recruitments we've completed in the past several years include: City Manager for the Towns of Atherton and Los Gatos; Deputy City Manager for Boulder, Colorado; City Manager for the cities of Hanford, Los Altos Hills, Vallejo, Culver City, Pittsburg, San Marino, Sanger, Pismo Beach, Union City, Avalon, Reedley, Suisun City and Gonzales; CAO for the County of San Bernardino; CEO for the Community Redevelopment Agency for the City of Los Angeles; General Manager for the City of Los Angeles Community Development Department; Assistant City Managers for the cities of Thousand Oaks, Riverside, Fremont, San Leandro, Vacaville and Lodi; and Assistant CAO for Culver City. Enclosed you will find a list of City Manager/Assistant City Manager/Deputy City Manager and CEO recruitments and the year they were completed, along with accompanying client references and a partial list of completed recruitments.

Mr. Kimura's expertise in executive, technical and business recruitment, which he gained during his nineteen years of advanced technology experience, provides the basis for many of the recruitment strategies and tactics utilized by the firm. Mr. Avery, having served in the past as a City Manager, provides the direct experience and knowledge of city administration. Collectively,



the firms Principals offer exceptional expertise in the area of executive recruitment. Enclosed you will find profiles on the Principals of the firm.  
Recruitment Team for the City of San José

Due to the importance of this assignment, we would assign both Bill Avery and Paul Kimura as project leads for this search. They will be assisted by Ann Slate and the administrative team with the firm. Mr. Avery and/or Mr. Kimura will be personally involved in each of the initial client discussions, stakeholder outreach meetings, strategy development, outreach, interview and assessment of candidates, presentation of final candidates and will be available throughout the search process to provide other related consulting services.

## Recruitment Plan and Services Provided

### I. Position Profile, Organizational Assessment & Stakeholder Outreach

The initial assessment phase and stakeholder outreach efforts are critical aspects of the search process. Mr. Avery will meet individually with the Mayor and each of the ten City Council members to discuss the position requirements and ideal candidate profile of the new City Manager.

We understand the critical importance that the City of San José places on a diverse and comprehensive outreach effort towards identifying the ideal candidate profile. We would develop a final list of outreach meetings with the assistance of city staff and City Council staff. We believe this outreach effort may result in at least 10 different meetings conducted throughout the City. Listed below are several key constituencies that would be included:

- Neighborhood homeowner associations throughout the City.
- Various chambers of commerce and business associations. San José has chambers representing the African-American, Hispanic, Filipino, and Japanese-American business communities. Additionally, there are various regional business associations such as the Downtown and Japantown groups.
- Leaders representing community based organizations with operations in the City. These organizations would range from human services, cultural entities, and the arts. It would be especially important to identify specific organizations that represent various ethnic and cultural communities within the City. Council staff members will be a key resource in identifying these organizations.
- Representatives from management and operational staff within city operations.



A member of the Avery Project Team would facilitate each of the outreach meetings scheduled. Upon completion of the outreach efforts, we would anticipate having a comprehensive set of criteria focused on the ideal candidate profile. The formal position announcement would be developed from the above discussions.

## II. Development of the Search Strategy

The search strategy is developed in conjunction with the organizational assessment. This will be a comprehensive national recruitment, which will require the following elements:

- Development of an original targeted candidate list based on our extensive recruitment, and on recommendations and referrals from individuals who have extensive contacts and relationships with executive personnel in local/regional government. This contact list will continue to grow throughout the outreach period as new names and referrals will be identified on an ongoing manner.
- Original search research, which consists of identification and contact of current public sector executives who meet the profile, but are not actively seeking other employment or have not been recommended or referred through our normal outreach.
- An extensive and personalized mailing campaign to current city managers and assistant city managers of prominent cities throughout the Country.
- Print advertising in Western City and Jobs Available magazines, and the ICMA newsletter.
- Internet job postings on national public sector employment bulletin boards, City Management, County Management, and related public sector sites. The listing will also be posted on the City website with a link to our company website, which will have an electronic copy of the job announcement.

## 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. Mr. Avery will personally interview those who appear to be suited for the position.

These extended personal interviews typically take one hour and a thorough discussion of their experience, accomplishments, management philosophy and interpersonal style takes place. Those individuals who best fit the position requirements will have a Candidate Assessment Report developed and documented for presentation to the client. We also conduct initial reference interviews on candidates selected for presentation.



#### 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.

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

#### 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 and hotel accommodations, as well as other interview planning issues.

Upon request, our firm will also arrange a summary background evaluation on the City's final one or two candidates. A copy of these confidential reports can be provided to you if desired.

#### 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 City, 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.

### Consulting Fee

Based on the services described in our proposal, the professional services consulting fee for this recruitment will be \$24,900. If awarded the search, we would request an initial retainer of \$8,300 at the outset of the search. A second installment of the \$8,300 would be invoiced 90 days following the initiation of the search. The final balance of \$8,300 would be invoiced at the completion of the search.



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 \$9,500. These expenses include: advertising, clerical time, supplies, printing, telephone, postage, summary background evaluations, and all consultant travel for client discussions, meetings and local and out-of-area candidate interviews. All expense items will be detailed and billed on a monthly basis. The consulting fee will be inclusive of all services defined within this proposal unless otherwise stated.

## 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 reasons which would have precluded his/her employment had they been known at the time employment started. In either case, we invoice a client only for out-of-pocket expenses incurred in identifying a replacement.







# 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

**P**aul Kimura brings a unique combination of recruitment and business experience to Avery clients.

Paul is involved in leading both private and 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."

# Related Recruitments

## City Manager

<u>Agency</u>	<u>Contact</u>	<u>Completion</u>
City of Belmont	Jack Crist	In progress
City of Emeryville	Delores Turner	In progress
City of Half Moon Bay	Marina Fraser	In progress
City of Rancho Palos Verdes	Les Evans	In progress
City of Vallejo	John Thompson	In progress
City of Hanford	Dan Chin	2006
City of King City	Bob Van Nort	2006
City of Los Altos Hills	Jean Mordo	2006
City of Redding	Linda Johnson	2006
City of Gonzales	Maria Orozco	2005
City of Avalon	Robert Kennedy	2004
City of Pittsburg	Yvonne Beals	2004
City of Reedley	Ray Forsyth	2004
City of San Marino	Robert Wishner	2003

## Assistant City Manager

City of Bakersfield	Alan Tandy	In progress
City of Thousand Oaks	Scott Mitnick	2005
City of Camarillo	Jerry Bankston	2005
City of Vacaville	David Van Kirk	2005

## General Manager/Executive Director

City of Los Angeles Redevelopment Agency	Patricia Francisco	2006
Monterey County Resource Mgmt. Agency	Elizabeth Brown	2005
City of San Jose Redevelopment Agency	Mark Danaj	2004

# Related References

for Avery Associates

Town of Los Gatos	
Joe Pirzynski, Vice Mayor. . . . .	408.356.3024
Town of Los Gatos	
Debra Figone, Town Manager. . . . .	408.354.6837
City of Culver City	
Jerry Fulwood, City Manager. . . . .	310.253.6001
City of Culver City	
Serena Wright, Personnel Director. . . . .	310.253.5640
City of Livermore	
Marshal Kamena, Mayor. . . . .	925.960.4020
City of Livermore	
Steve Harman, Personnel Director. . . . .	925.960.4100

# Avery Recruitments

The following represents a partial list of Key Public Sector and Non-Profit Executive Recruitments completed by the Principals of Avery Associates:

## City Manager

Atherton  
Avalon  
Belmont  
Chowchilla  
Colma  
Culver City  
Gonzales  
Hanford  
Los Altos Hills  
Los Gatos  
Pismo Beach  
Pittsburg  
Redding  
Reedley  
Sanger  
San Marino  
Suisun City  
Vallejo

## Asst/Dpty City Manager

Bakersfield  
Boulder, CO  
Camarillo  
Dublin  
Fremont  
Huntington Beach  
Lodi  
Los Gatos  
Moreno Valley  
Riverside  
San Leandro  
Thousand Oaks  
Vacaville

## CEO/Executive Director

City of San Jose – Redevelopment Agency  
Community Redevelopment Agency – City of Los Angeles  
Monterey County Resource Management Agency  
First 5 Monterey County  
Fresno Housing Authority  
EOC of SLO County  
Joint Venture – Civic Action Network  
Joint Venture – Silicon Valley  
San Luis Obispo Housing Authority  
Santa Barbara – CAC  
Support Network for Battered Women

## City Attorney

Bakersfield  
Inglewood  
Livermore  
San Luis Obispo  
Union City  
Vallejo

## Parks/Recreation Director

Belmont  
Boulder, CO  
Corona  
Culver City  
Encinitas  
Gilroy  
Los Gatos  
Santa Clarita  
Westminster

## HR Director

Fremont  
Lancaster  
Los Angeles County  
Los Gatos  
Newport Beach  
Riverside  
San Bernadino County  
San Leandro  
San Luis Obispo  
Santa Clarita  
Santa Cruz  
Sonoma County  
Santa Clara Valley Transit Authority

## Finance/Admin Services Director

Dublin  
Encinitas  
Fort Bragg  
Los Gatos  
Monterey County  
Oceanside  
Oxnard  
Palmdale  
Santa Clara  
Santa Clarita  
Santa Cruz  
Santa Rosa  
Union City

## Public Works Director/Manager

Bishop  
Clovis  
Culver City  
Encinitas  
Los Gatos  
Monterey County  
Moreno Valley  
Olympia, WA  
Palmdale  
Paso Robles  
Pomona  
San Luis Obispo  
Santa Clarita  
Santa Rosa  
Union City

## Community Development/ Planning Director

Beverly Hills  
Culver City  
Dublin  
Encinitas  
Gilroy  
Morgan Hill  
Oakland – Housing  
Paso Robles  
San Leandro  
San Ramon  
Saratoga  
Vacaville  
Woodland

## Director of IT

Boulder, CO  
Huntington Beach  
Modesto  
Monterey County  
Sonoma County

## Fire Chief

Culver City  
Fairfield  
Fresno  
Gilroy  
Moraga/Orinda  
Redwood City  
San Luis Obispo  
Visalia

## Police Chief

Arroyo Grande  
Beverly Hills  
Culver City  
Gilroy  
Los Gatos  
Napa  
Pleasant Hill  
Pomona  
San Luis Obispo  
Santa Rosa  
Union City  
Vallejo  
Visalia  
Woodland

## Other

Alameda – Risk Manager  
Fremont – City Clerk  
Glendale – Library Director  
Los Gatos – Library Director  
Pasadena – Chief Prosecutor  
San Mateo – Library Director  
Monterey County – Director of Human Services