

DATE: May 2, 2017
TO: SAWPA Commission
SUBJECT: Award of Contract for Executive Search Services
PREPARED BY: Susan Lien Longville, Commission Chair

RECOMMENDATION

That the Commission approve award a contract to Bob Murray & Associates in an amount not to exceed \$24,900 to provide executive search services for the General Manager position, and provide further direction to staff regarding next steps.

DISCUSSION

Responses to the Request for Proposals (RFP) for executive search services were received until 4:00 p.m. on Friday, April 28, 2017. One proposal was received, from Bob Murray & Associates, located at 1544 Eureka Road, Suite 280, Roseville, California. The firm has extensive experience recruiting high-level local government professionals, including recruitments in Riverside County.

Professional Fees and Expenses: \$24,900 (\$17,500, plus \$7,400 estimated expenses)

Proposed Recruitment Process:

- Develop Candidate Profile
- Advertising Campaign | Recruitment Brochure
- Candidate Recruitment
- Candidate Screening
- Conduct Personal Interviews
- Candidate Public Record Search
- Recommendation
- Candidate Interviews – Final
- Background Check | Detailed Reference Check
- Negotiations
- Assignment Completion

CRITICAL SUCCESS FACTORS

None identified for this activity.

RESOURCE IMPACTS

\$24,900, which will be paid from the General Fund.

Attachment:

1. Proposal – Bob Murray & Associates

A PROPOSAL TO CONDUCT AN EXECUTIVE
RECRUITMENT FOR A
General Manager
ON BEHALF OF THE
Santa Ana Watershed Project Authority (SAWPA)



1544 Eureka Road, Suite 280
Roseville, CA 95661
(916) 784-9080
(916) 784-1985 fax

April 27, 2017

Ms. Longville, Board Chair
and Commission
Santa Ana Watershed Project Authority (SAWPA)
11615 Sterling Avenue
Riverside, CA 92503

Dear Chairwoman Longville and Commissioners:

Thank you for inviting Bob Murray & Associates to submit a proposal to conduct the General Manager recruitment for the Santa Ana Watershed Project Authority (SAWPA). The following proposal details our qualifications and describes our process of identifying, recruiting and screening outstanding candidates on your behalf. It also includes a proposed budget, timeline, guarantee, and sample recruitment brochure.

At Bob Murray & Associates, we pride ourselves on providing quality service to local governments. We have created a recruitment process that combines our ability to help you to determine the direction of the search and the types of candidates you seek with our experience recruiting outstanding candidates who are not necessarily looking for a job. Our proven expertise ensures that the candidates we present for your consideration will match the criteria you have established and will be outstanding in their field.

With respect to the General Manager recruitment, Bob Murray & Associates offers the following expertise:

- ◆ Our firm has an unmatched record of success in recruiting local government professionals. We have conducted numerous General Manager/District Manager searches on behalf of large and small cities and districts throughout the Western United States. We recently completed the General Manager recruitments on behalf of the Yuima Municipal Water District; Mendocino County Russian River Flood Control & Water Conservation Improvement District; the East Valley Water District, the Montecito Water District; the Monterey Regional Waste Management District; the Big Bear City Community Services District; South Placer Municipal Utility District; United Water Conservation District, CA; the District Manager recruitment for San Lorenzo Valley Water District, CA; as well as for the Central Arizona Project. Our recent experience also includes the General/District Manager recruitments on behalf of Calaveras County Water District; Jurupa Community Services District; Kennewick Irrigation District; and the Mid-Peninsula Water District. Our previous experience includes General Manager recruitments for the Joshua Basin Water District; Rainbow Municipal Water District; Sweetwater Springs Water District; Walnut Valley Water District; and Valley of the Moon Water District. This experience will be valuable in both the candidate search and evaluation, as will our contacts in the water resources industry.

- ✦ We have conducted numerous searches for management professionals working in the fields of water management and supply. We are currently conducting multiple searches on behalf of the Santa Clara Valley Water District, CA and recently completed the Assistant General Manager recruitment on behalf of the East Valley Water District, CA; the General Manager recruitment on behalf of the Mendocino County Russian River Flood Control & Water Conservation Improvement District; the Water Conservation Administrator, Water Resources Manager, and two Project Manager recruitments on behalf of the City of Beverly Hills, CA; and the General Manager recruitment on behalf of the Montecito Water District, CA. Our other most recent clients in the water resources industry include the City of San Diego Department of Public Utilities; the Las Vegas Valley Water District, NV; the Monterey County Water Resources Agency, CA; and the San Lorenzo Valley Water District, CA. For a complete account of our 30+ previous searches in the water resources field, we invite you to refer to the enclosed Client List. Our experience and knowledge of outstanding candidates will ensure you have a quality group of finalists from which to select the Santa Ana Watershed Project Authority's next General Manager.

- ✦ Bob Murray & Associates is familiar with Riverside County and the surrounding region as we are currently conducting the City Attorney and Director of Engineering Services recruitment on behalf of the City of Palm Springs. We most recently completed the City Clerk recruitment on behalf of the City of Moreno Valley; the City Manager recruitment on behalf of the City of Banning; the Purchasing Manager, Library & Recreation Services Director, and Economic Development Manager recruitments on behalf of the City of Corona; the City Attorney recruitment on behalf of Moreno Valley; and the Community and Economic Development Director recruitment on behalf of the City of Palm Springs. Other recent projects include the Fire Chief and Community Economic Development Director recruitments on behalf of the City of Palm Springs; the Police Chief, and the Fire Chief, and City Manager recruitments on behalf of Cathedral City. In addition, we have completed recruitments on behalf of the cities of Corona, Lake Elsinore, La Quinta, Menifee, Moreno Valley, Murrieta, Palm Desert, Palm Springs, and Riverside. Our knowledge of the region, its issues and the County's outstanding quality of life will be an asset in presenting this opportunity to prospective candidates.

A significant portion of our process focuses on conducting thorough and confidential background investigations of the top 2-3 candidates to ensure that nothing about them is left undiscovered. We have candid discussions with references who have insight into the candidate's experience, style and ethics; conduct a search of newspaper articles; and run credit, criminal and civil records reports. This ensures that the chosen candidate will not only be an excellent fit with the Santa Ana Watershed Project Authority (SAWPA), but also that the selected candidate will reflect positively upon your organization.

To learn first-hand of the quality of our service and our recruitment successes, we invite you to contact the references listed on page 10 of the attached proposal.

We look forward to your favorable consideration of our qualifications. Please do not hesitate to contact us at (916) 784-9080 should you have any questions.

Sincerely,

Valerie Gaeta Phillips

Valerie Gaeta Phillips

President, Bob Murray & Associates

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THE RECRUITMENT PROCESS

Bob Murray & Associates' unique and client oriented approach to executive search will ensure that the Santa Ana Watershed Project Authority (SAWPA) has quality candidates from which to select the new General Manager. Outlined below are the key steps in our recruitment process.

STEP 1 DEVELOPING THE CANDIDATE PROFILE

Our understanding of the SAWPA's needs will be key to a successful search. We will work with the Commission to learn as much as possible about the organization's expectations for a new General Manager. We want to learn the values and culture of the organization, as well as understand the current issues, challenges and opportunities that face the SAWPA. We also want to know the Commission's expectations regarding the knowledge, skills and abilities sought in the ideal candidate and will work with the Authority to identify expectations regarding education and experience. Additionally, we want to discuss expectations regarding compensation and other items necessary to complete the successful appointment of the ideal candidate. The profile we develop together at this stage will drive subsequent recruitment efforts.

STEP 2 ADVERTISING CAMPAIGN AND RECRUITMENT BROCHURE

After gaining an understanding of the SAWPA's needs, we will design an effective advertising campaign appropriate for the General Manager recruitment. We will focus on professional journals that are specifically suited to the General Manager search. We will also develop a professional recruitment brochure on the Commission's behalf that will discuss the community, organization, position and compensation in detail. Once completed, we will mail the profile to an extensive audience, making them aware of the exciting opportunity with the SAWPA.

STEP 3 RECRUITING CANDIDATES

After cross-referencing the profile of the ideal candidate with our database and contacts in the field, we will conduct an aggressive outreach effort, including making personal calls to prospective applicants, designed to identify and recruit outstanding candidates. We recognize that the best candidate is often not looking for a new job and this is the person we actively seek to convince to become a candidate. Aggressively marketing the General Manager position to prospective candidates will be essential to the success of the search.

STEP 4 SCREENING CANDIDATES

Following the closing date for the recruitment, we will screen the resumes we have received. We will use the criteria established in our initial meetings as a basis upon which to narrow the field of candidates.

STEP 5 PERSONAL INTERVIEWS

We will conduct personal interviews with the top 10 to 12 candidates with the goal of determining which candidates have the greatest potential to succeed in your organization. During the interviews, we will explore each candidate's background and experience as it relates to the General Manager position. In addition, we will discuss the candidate's motivation for applying for the position and make an assessment of his/her knowledge, skills and abilities. We will devote specific attention to establishing the likelihood of the candidate's acceptance of the position if an offer of employment is made.

STEP 6 PUBLIC RECORD SEARCH

Following the interviews, we will conduct a review of published articles for each recommended candidate. Various sources will be consulted including Lexis-Nexis™, a newspaper/magazine search engine, Google, and social media. This alerts us to any further detailed inquiries we may need to make at this time.

STEP 7 RECOMMENDATION

Based on the information gathered through meetings with your organization and personal interviews with candidates, we will recommend a limited number of candidates for your further consideration. We will prepare a detailed written report on each candidate that focuses on the results of our interviews and public record searches. We will make specific recommendations, but the final determination of those to be considered will be up to you.

STEP 8 FINAL INTERVIEWS

Our years of experience will be invaluable as we help you develop an interview process that objectively assesses the qualifications of each candidate. We will adopt an approach that fits your needs, whether it is a traditional interview, multiple interview panel or assessment center process. We will provide you with suggested interview questions and rating forms and will be present at the interview/assessment center to facilitate the process. Our expertise lies in facilitating the discussion that can bring about a consensus regarding the final candidates.

We will work closely with your staff to coordinate and schedule interviews and candidate travel. Our goal is to ensure that each candidate has a very positive experience, as the manner in which the entire process is conducted will have an effect on the candidates' perception of your organization.

STEP 9 BACKGROUND CHECKS/DETAILED REFERENCE CHECKS

Based on final interviews we will conduct credit, criminal, civil litigation and motor vehicle record checks for the top one to three candidates. In addition, those candidates will be the subjects of detailed, confidential reference checks. In order to gain an accurate and honest appraisal of the candidates' strengths and weaknesses, we will talk candidly with people who have direct knowledge of their work and management style. We will ask candidates to forward the names of their supervisors, subordinates and peers for the past several years. Additionally, we make a point of speaking confidentially to individuals who we know have insight into a candidate's abilities, but who may not be on their preferred list of contacts. At this stage in the recruitment we will also verify candidates' degrees.

STEP 10 NEGOTIATIONS

We recognize the critical importance of successful negotiations and can serve as your representative during this process. We know what other organizations have done to put deals together with great candidates and will be available to advise you regarding current approaches to difficult issues such as housing and relocation. We will represent your interests and advise you regarding salary, benefits and employment agreements with the goal of putting together a deal that results in the appointment of your chosen candidate. Most often we can turn a very difficult aspect of the recruitment into one that is viewed positively by both you and the candidate.

STEP 11 COMPLETE ADMINISTRATIVE ASSISTANCE

Throughout the recruitment, we will provide the Board Chair and Commissioners with updates on the status of the search. We will also take care of all administrative details on your behalf. Candidates will receive personal letters advising them of their status at each critical point in the recruitment. In addition, we will respond to inquiries about the status of their candidacy within twenty-four hours. Every administrative detail will receive our attention. Often, candidates judge our clients based on how well these details are handled.

BUDGET AND TIMING

PROFESSIONAL FEE AND EXPENSES

The consulting fee for conducting the General Manager recruitment on behalf of the Santa Ana Watershed Project Authority (SAWPA) is \$17,500 plus expenses. Services provided for in the fee consist of all steps outlined in this proposal including three (3) days of meetings on site. The SAWPA will be responsible for reimbursing expenses Bob Murray & Associates incurs on your behalf. We estimate expenses for this project to be \$7,400. Reimbursable expenses include such items as the cost of recruiter travel; clerical support; brochure development; placement of ads; credit, criminal and civil background checks; education verification; and public records searches. Postage, printing, photocopying, and telephone charges are allocated costs and included in the expense estimate.

TIMING

We are prepared to start work on this assignment immediately and anticipate that we will be prepared to make our recommendation regarding finalists within seventy-five to ninety days from the start of the search.

Task:

Week:

| | |
|---|-----------------------------------|
| Contract Start Date: | TBD |
| Initial Meeting(s): | 1 week from contract start date |
| Our firm develops recruitment brochure: | 2 weeks from contract start date |
| Authority approves brochure: | 4 weeks from contract start date |
| Job advertising and candidate sourcing: | 8 weeks from contract start date |
| Our firm reviews application packets: | 9 weeks from contract start date |
| Our firm conducts screening process: | 10 weeks from contract start date |
| Authority approves candidates: | 12 weeks from contract start date |
| Authority's interview panel convenes: | 13 weeks from contract start date |
| Reference/Background Checks: | 14 weeks from contract start date |
| Second Interviews by Authority, if necessary: | 15 weeks from contract start date |
| Offer of Employment: | 16 weeks from contract start date |

GUARANTEE

We guarantee that should a recommended candidate selected for the position be terminated within the first year of employment we will conduct the search again at no cost (with the exception of expenses) to the SAWPA. We are confident in our ability to recruit outstanding candidates and do not expect the SAWPA to find it necessary to exercise this provision of our proposal.

PROFESSIONAL QUALIFICATIONS

BOB MURRAY, FOUNDER

Mr. Murray brings over 30 years' experience as a recruiter. Mr. Murray is recognized as one of the nation's leading recruiters. He has conducted hundreds of searches for cities, counties, and special districts. He has been called on to conduct searches for some of the largest most complex organizations in the country and some of the smallest. Mr. Murray has conducted searches for chief executives, department heads, professional and technical positions. Mr. Murray has taken the lead on the firm's most difficult assignments with great success. His clients have retained him again and again given the quality of his work and success in finding candidates for difficult to fill positions.

Prior to creating Bob Murray & Associates, Mr. Murray directed the search practice for the largest search company serving local government in the country. Mr. Murray has worked in local government and benefits from the knowledge of having led an organization. Prior to his career in executive search he served as the City Manager for the City of Olympia, Washington. He has also served as an Assistant City Manager and held various positions in law enforcement.

Mr. Murray received his Bachelor of Science Degree in Criminology from the University of California at Berkeley with graduate studies in Public Administration at California State University at Hayward.

VALERIE GAETA PHILLIPS, PRESIDENT

Ms. Gaeta Phillips has over 18 years of recruiting experience, including more than a decade of recent experience in executive search for public, private, and startup companies nationwide. Ms. Gaeta Phillips has expertise in the full recruiting cycle, from process design and outreach through candidate assessment and selection. She has placed senior-level candidates in various aspects of the public sector, as well as with special districts and nonprofits.

Ms. Gaeta Phillips is valued for her passion for finding and retaining the most outstanding candidates for even the most difficult or untraditional assignments and for her commitment to her clients' success. Ms. Gaeta Phillips has a passion for helping people, evidenced by her fundraising and efforts to raise awareness for organizations such as Autism Speaks and the M.I.N.D. Institute.

GARY PHILLIPS, EXECUTIVE VICE PRESIDENT

Mr. Phillips started his career with a New York based Fortune 100 company and quickly became a Senior Manager building and running a large customer service organization in New York and eventually in thirteen countries in Europe. He also served as a Director with a large Fortune 500 company and was responsible for developing and maintaining new and existing clients in Europe, Asia, and Australia. He then became Senior Vice President with a public enterprise software company. Some of his successes include building an organization from 2 to 250 people worldwide; acquiring 5 companies in two years; and growing a company from 800 to 1200 employees.

Mr. Phillips was part of an executive acquisition and recruiting team where he helped build a start-up enterprise software company in San Francisco. He recruited top notch talent, and built a world class organization. The company was eventually sold to a Fortune 500 software company.

Mr. Phillips has maintained customer relationships in the public sector, private sector, as well as medical, and financial institutions. He prides himself on finding key talent and offering the best customer service to his clients.

Mr. Phillips is involved in his community as a soccer coach and as an organizer of fundraisers for Autism Speaks in Sacramento. Mr. Phillips received his Associate of Science degree, as well as completed coursework at Rochester Institute of Technology, NY.

REGAN WILLIAMS, SENIOR VICE PRESIDENT

Mr. Williams brings 30 years of local government experience to Bob Murray & Associates and has over 15 years of experience in executive recruitments with our firm. Prior to joining Bob Murray & Associates, Mr. Williams served as Director of Public Safety with the City of Sunnyvale, CA. Mr. Williams was involved in the development of some of Sunnyvale's most innovative public safety programs and has a national reputation for excellence in law enforcement, as well as in law enforcement executive recruiting. He has been responsible for over 300 recruitments throughout his career; clients find his insight and expertise in recruitment and selection a valuable asset.

Mr. Williams received his Bachelor of Science Degree in Administration of Justice from San Jose State University. He is also a graduate of the FBI National Academy.

JOEL BRYDEN, VICE PRESIDENT

Mr. Bryden has over 30 years of local government experience that he brings to the firm, having retired as Chief of Police in Walnut Creek, CA prior to joining our firm. Throughout his career, Mr. Bryden has been involved in public sector consulting. He has vast experience in hiring and promotional processes, as well as interviewing candidates for advancement in all aspects of local government. Mr. Bryden has a solid reputation as a leader in the public sector. His ability to find and evaluate outstanding applicants for our clients is invaluable in the search process.

Mr. Bryden is a graduate of the FBI National Academy and obtained his Bachelor of Arts Degree in Communication from San Diego State University.

FRED FREEMAN, VICE PRESIDENT

Mr. Freeman brings over 24 years of local government experience to Bob Murray & Associates, with 11 years in the recruitment field. Mr. Freeman is a retired Chief of Police and has served as an elected official in local government. He has vetted hundreds of local governmental officials in the pre-employment process and conducted recruitments for positions in all sectors of public agency employment.

In addition to his career in the law enforcement field, Mr. Freeman served as the Mayor and the Mayor Pro-Tem for the Los Alamitos City Council. Mr. Freeman has been a member of the Public Safety Policy Committee - California League of Cities; the Orange County Fire Authority Board of Directors; and the Orange Line Development Authority as the Vice-Chair. His unique perspective and experience, as both a member of executive city staff and as an elected official, provides exceptional results for our clients.

Mr. Freeman is a graduate of the FBI National Academy and received his Teaching Credential from the University of California Los Angeles.

AMBER SMITH, PRINCIPAL CONSULTANT

As Principal Consultant with Bob Murray & Associates, Ms. Smith acts as a liaison between clients and candidates from beginning to end of each recruitment process. She is responsible for the development and distribution of position recruitment and advertising materials, client research, reference and background checks, responding to requests for proposals, and providing a broad range of support services for the recruiting team.

Ms. Smith brings over 5 years of client-oriented customer service, administrative, and management experience to Bob Murray & Associates. She is committed to working as a partner with clients and candidates in order to provide a quality service and experience.

Ms. Smith received her Bachelor of Arts degree in Business Administration from La Sierra University, Riverside, California.

HELLEN AMSDEN, SENIOR CONSULTANT

Ms. Amsden acts as a liaison among clients, recruiters, and candidates throughout each recruitment process. Her responsibilities include development and distribution of position recruitment and advertising materials, client and candidate research, reference and background checks, responding to requests for proposals, and providing a broad range of support services for the recruiting team.

Ms. Amsden joined our firm in 2016 with nearly a decade of customer service, administrative, and leadership experience. She is committed to providing the highest level of quality support and to working as a partner with clients and candidates throughout the search process.

Ms. Amsden graduated summa cum laude with a Bachelor of Arts degree in Leadership and Organizational Studies from Saint Mary's College of California.

REFERENCES

Clients and candidates are the best testament to our ability to conduct quality searches. Clients for whom Bob Murray & Associates has recently conducted searches are listed below.

CLIENT: Yuima Municipal Water District, CA
POSITION: General Manager
REFERENCE: Mr. W.D. "Bill" Knutson, Board President, (760) 742-3704

CLIENT: United Water Conservation District, CA
POSITION: General Manager and Engineering Manager
REFERENCE: Mr. Lynn Maulhardt, President of the Board, (805) 525-4431

CLIENT: Mid-Peninsula Water District, CA
POSITION: General Manager
REFERENCE: Mr. Al Stuebing, Board President, (650) 591-8941

CLIENT: City of Moreno Valley, CA
POSITION: City Attorney; City Clerk
REFERENCE: Ms. Terri Stevens, Admin Services Director, (851)413-3045

CLIENT: City of Palm Springs, CA
POSITION: Community and Economic Development Director; Fire Chief; Currently Recruiting – City Attorney, Director of Engineering Services
REFERENCE: Mr. Perry Madison, Human Resources Director, (760) 323-8215

