

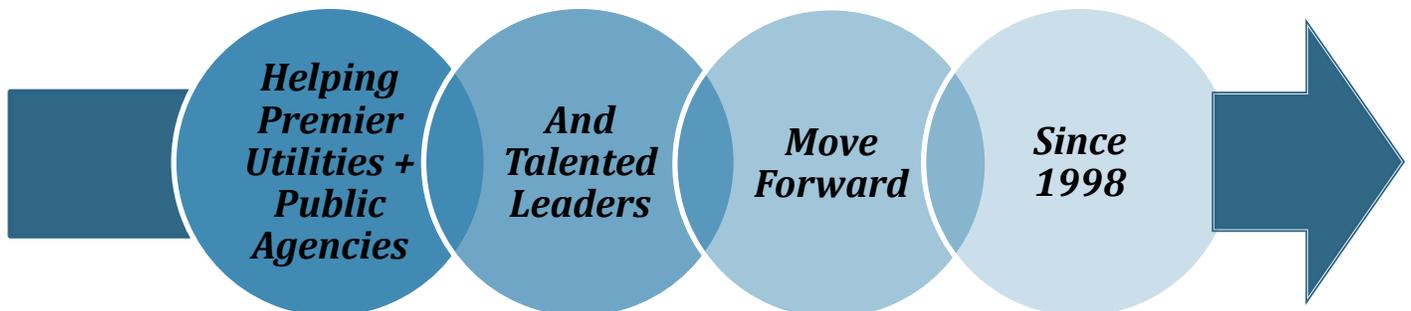
# Tedesco Proposal: General Manager (GM)

## Retained Executive Search

Presented to:



Move Forward



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## Executive Summary

September 9, 2025

Brynna Bryant  
Human Resources  
Northern California Power Agency  
651 Commerce Drive  
Roseville, CA 95678

Dear Brynna,

Thank you very much to you, Randy Howard and the Board for the opportunity to submit this Proposal to Northern California Power Agency (NCPA) and for considering J. Tedesco & Associates, a California-based retained executive search firm, to lead your General Manager (GM) executive search. By retaining our firm for this engagement, NCPA will receive the following unique and unmatched qualifications:

- **Stability and Experience:** Our firm has been in business since 1998 and our team has 90+ years of combined experience in retained executive search. Our Managing Director has 30 years and served as a Senior Partner and Utility Sector Leader at Korn Ferry. Our Senior Consultant worked for a Fortune 200 investor-owned utility before joining up with our firm.
- **Nationally recognized, utility industry specialists.** Whether IOU, Public Power, Muni, CCA, JPA/JAA, IPP or energy trading, we span the sector, including electric, gas and water. Our wisdom helps us source better candidates and gain instant credibility/trust with them.
- **A successful track record serving utility sector-focused, public agencies in California:** We recently led San Diego Community Power's Chief Commercial Officer search and Ava's CEO search. Additionally, we led CC Power's GM search and have led approximately 12 recruitments for SVCE. Other agencies served in the state include IID and SMUD.
- **San Diego-based with a successful track record serving California organizations:** Our headquarters are in San Diego. And our California clients, in addition to those mentioned above, have included: Sempra, San Jose Water and PG&E. We know the cities and communities across the state, including the greater Sacramento area, + the state's regulatory landscape, and how to attract candidates to the area. (See pages 10-11 for more details)
- **Diversity is a priority.** We continue to ensure that each search contains a slate of candidates with diverse backgrounds.

- **Hogan Leadership Assessment of finalist candidates.** This assessment and the debrief that follows with the Hogan consultant provides an additional data point and valuable insights on how an individual does their best work and how they respond under stress. Unlike the large firms that have their own assessments, utilizing Hogan is an unbiased, 3<sup>rd</sup> party perspective (a best practice).
- **Extensive Advisory and Support Services:** Beyond recruiting candidates, we will advise/steer the search committee and board as trusted advisors throughout the entire process. That could include: advising on suggested qualifications for the GM, designing and facilitating your interviews with the candidates, serving as the point of contact for candidate interview coordination and scheduling, including serving as the travel agency, guiding post-interview debriefs, managing reference and background checks, administering leadership assessments of top candidates, leading the offer & negotiation process, and facilitating board presentation of top candidates. (See scope of services on page 7 for more detail)
- **We are dependable and long-term relationship focused.** We take great pride in the lasting business relationships that have been forged from who we are, how we work and the exceptional results we achieve. We are often spending time with clients out of the office, further strengthening trust and connections. While we do have some newer clients, most of them are 7+ year relationships (some 25+ years)

Thank you for considering the retained executive search services of J. Tedesco & Associates. We likely will not be the least or most expensive proposal, but we will deliver the highest of service and best-in-class results. In the following pages, we address each element of your RFP in detail. We would be honored to partner with NCPA in identifying and securing a high-caliber General Manager who can build on Randy's legacy of service and position the agency for continued success. With our proven utility sector expertise, search execution best practices and immediate readiness to launch, we are uniquely positioned to deliver the leadership talent your organization deserves.

Best regards,



Jonathan L. Tedesco  
 Managing Director  
 J. Tedesco & Associates  
 (a California-Based Sole Proprietorship)  
 office: 858.755.8550/cell: 312.399.1075  
 E: [JLT@tedescoassociates.com](mailto:JLT@tedescoassociates.com)

# Our Qualifications

## We understand Your Agency

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*Having partnered with public agencies and diverse utility sector companies for 30 years, we know and appreciate your business.*

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We recognize that The Northern California Power Agency (NCPA) is a California Joint Action Agency that was originally established in 1968 as a forum through which community-owned utilities could prevent costly market abuses employed by private utilities at that time, and to make investments that would ensure an affordable, reliable, and clean supply of energy for electricity customers in its member communities. We further understand that NCPA membership includes municipalities, rural electric cooperatives, and other publicly owned entities interested in the purchase, aggregation, scheduling, and management of electrical energy. Most critically for its 16 members, NCPA constructs, operates, and maintains a diverse fleet of power plants and power purchase agreements that serve more than 700,000 Member customers with clean, reliable, and affordable electricity all across Northern California. Several non-Members utilities also participate in some of NCPA's generation assets. They include California Department of Water Resources, Turlock Irrigation District, Modesto Irrigation District, and City of Azusa. NCPA operates assets valued at over \$1 billion with an annual budget of \$565 million. The Agency currently has \$375 million in debt financing. The Agency is overseen by knowledgeable leaders from member communities. These are locally elected or appointed officials who serve as energy regulators in their cities, towns, and districts, and volunteer their time for NCPA governance. Because these individuals live and work near their consumers and remain directly accountable for the utility service in their communities, they provide an extremely responsive and effective governing body. Over the years, they have fostered a culture of innovation and charted a visionary course of technological innovation and environmental stewardship. In addition to serving its Member utilities, NCPA supports a number of contract customers that include 3 of California's Community Choice Aggregators (CCAs) and several water agencies with Power Management Services. NCPA schedules approximately 85 resources into the CAISO which equates to about 12% of the market resources.

## We Understand Your Business Need

NCPA is seeking qualified proposals from executive recruitment service providers to provide assistance in identifying and hiring a General Manager by the first quarter of 2026. This is due to Randy Howard's upcoming retirement, following his nearly 11 years at NCPA, and his 40+ year professional career. The scope of the Services is generally described as follows: We recognize that you are seeking a search firm to develop an effective recruitment process, and identify potential candidates through advertising, networking and other methods. In addition, we recognize that NCPA is seeking a search firm that will meet with the Executive Committee and/or the Commission, to determine the professional qualities, experience and skills desirable in a GM candidate, and then assist the NCPA Executive Committee and the NCPA Commission in locating, interviewing, evaluating, and providing a written assessment of each potential candidate for the position of NCPA GM. The scope of services is described in much greater detail on page 7 of this Proposal.

## We Understand Key Responsibilities of the NCPA (executed by the GM and their team)

- Building, operating, and maintaining NCPA's 850MW of owned generation facilities located throughout Northern California.
- Issuing bonds to finance and build new generation resources to meet member needs.
- Dispatching and scheduling energy 24/7 to utilities to meet the real-time electricity needs of customers.
- Making short and long-term market purchases to provide power supply as needed to enable members to serve their customers reliably, affordably, and meeting environmental goals.
- Planning and forecasting electricity demand and long-term supply requirements of members, as well as monitoring market conditions for electricity, natural gas, environmental products, and transmission and pipeline availability. This suite of services assures the lowest possible rates for customers of NCPA member utilities.
- Representing the Agency and its members in local, state, and federal legislative and regulatory forums. Partnering with local, state, and federal policymakers to protect consumers and promote sound energy and environmental policies.
- Providing opportunities, through joint action, to capture best practices and optimize retail customer programs that are locally tailored and administered by members. These include energy efficiency programs, low-income programs, and economic development.

## A Suggested Sourcing Strategy Given the Above Responsibilities:

A person with the qualifications to lead the NCPA with responsibilities listed on the prior page will likely be an accomplished, politically astute leader with a financial acumen and a broad commercial background (front, mid and back office) in power services that come from the following organizations: a CCA, public power (like SMUD or LADWP), large municipality, Investor-owned utility (examples: SDG&E/SCE/PG&E), CAISO (or a similar energy market agency), SCPPA, energy services, IPP or an energy trading organization (like Calpine/Shell etc). Ironically, Shell Trading is in our same office building. We recognize that CAISO experience is extremely valuable, and if NCPA requires candidates to have this experience, then they will most likely live in California (or will have led work in California). Otherwise if WECC experience is acceptable, then that opens up the sourcing strategy to 14 western states. More details about the position and our overall candidate sourcing strategy will become clearer after we have conversations with key stakeholders.

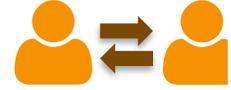
## Our Scope of Services Match your RFP Requirements

### For this search, we will:

1. **Execute an Agreement for Consulting Services** with all necessary insurance certs.
2. **Provide input on the NCPA GM job description**
3. **Prepare a time schedule for the completion of services.**
4. **Work and Communicate with Staff and Others** - Work with the Executive Committee and NCPA Commission through all phases of the GM search and selection process. Provide regular updates to the Exec Committee – we recommend 15, 20 and 25 business days, with a formal presentation at 25 business days. Our firm will attend meetings of the Exec Committee, NCPA Commission and other meetings as requested. Confidentiality will be exercised as needed.
5. **Develop a Position Profile and Outreach Plan** – We will assist with cultivating a search profile for the GM position and we will support and assist in the development, advertisement, and disbursement of the position announcement. This includes developing a specific outreach plan.
6. **Develop Selection Criteria** - We will support the Executive Committee in developing selection criteria based on the position profile, the job description or general outline of duties and responsibilities for the GM position. Our firm will make recommendations to help in the creation of the NCPA job description and external messaging. From these stakeholder discussions, our firm will generate our position specification document, which will be shared with prospective candidates and aimed at attracting both active and passive candidates.
7. **Identify a Diverse Group of Applicants** - We will identify a diverse pool of qualified candidates that include national, regional, in-state, and local candidates, from active candidates (those pursuing a job change) as well as passive candidates (those not in the job market, but who are open to considering the role). Our candidate sourcing strategy is thorough, strategic and best in class. See recommended CAISO experience listed above under suggested sourcing strategy

8. **Target Outreach** As part of our candidate sourcing strategy, we will engage in targeted outreach to other public agencies, CCAs, or other entities providing utility services similar to NCPA. Again, please see suggested sourcing strategy at the top of page 7.
9. **Candidate Landing Page** – You suggested that the executive recruitment firm develop a landing page to host candidates' complete questionnaires and resumes. *We can do this, but we recommend against it. A portal works better for lower level searches, but for a GM search we recommend that candidate information and our candidate write ups be shared through email by way of our status report, along with a formal presentation and discussion of each candidate. There is an incomplete story when relying on a portal.*
10. **Execute Candidate Search** - Execute a search for candidates with qualifications meeting the position profile. Work with the Executive Committee to compile a list of suitable target candidates, including direct outreach to listed candidates.
11. **Screen Candidates and Provide Profiles** – Screen and interview candidates as appropriate to ascertain the suitability of potential candidates. Our firm will have a video call with any candidates we intend to present, and can also interview candidates in person at NCPA’s request. As you requested, we will provide the Executive Committee at least ten (10) candidate profiles, including written materials submitted by the candidates, preliminary references, our summary reports, potential conflicts of interest, and other available, relevant information.  
*Working with the Exec Committee to: a. implement a screening process that narrows the field of candidates to those that most closely match the needs of NCPA; and b. provide the Executive Committee with detailed information about the background and experience of the top candidates.*
12. **Candidate Interviews and Assessments** – Support/assist the Executive Committee during all candidate interviews. Arrange candidate interviews, design interview questions, prepare the Exec Committee for interviews, execute the interview process, and assist in the assessment process.
13. **Hogan Leadership Assessment (extra step)** – Our firm has a partnership with Hogan Leadership Assessments, which is a best-in-class online assessment tool. The candidate takes the assessment, a report is generated, and then there is a 1 hour debrief with the Hogan Consultant, Tedesco and the search committee. This step is performed with the final 1-3 candidates.
14. **Perform Reference Checking on Top Candidates** – We provide in-depth references for the finalist candidate with written reports. References are best utilized as final step in the process. as a development tool to support the hired candidate’s success in the new role.
15. **Final Selection of Candidate** – We assist the Exec Committee with selection and negotiations with the finalist candidate, and recommend strategies for successful candidate retention.
16. **Assisting the Executive Committee in conducting legally compliant background checks** - including candidate litigation history and publicly available websites. We use Hire Right and Checkr for our candidate background checks, which are used by Fortune 500 companies and public agencies alike. It provides comprehensive education, employer and criminal checks.
17. **We advise and support the offer & negotiation** – We can support the search committee with negotiating an acceptable compensation and benefits package with the selected candidate.
18. **Consult with NCPA General Counsel** – We will consult with NCPA General Counsel on legal issues and documents related to the General Manager's employment contract as needed.
19. **Transition Activities** – We will assist the successful candidate with transitioning activities into the role of General Manager.

# Tedesco Search Process (in Business Days)



<b>Plan</b> Prior to Day 1	<b>Source</b> Days 1-15	<b>Screen</b> Days 10-20	<b>Select</b> Days 20-60	<b>Hire</b> Days 60-90	<b>Contribute</b> Days 90+
<p><i>Prepare</i></p> <p>Signed Agreement triggers search launch for JTA</p> <p>JTA team, including the engagement leader, senior consultant and researcher have preliminary research meeting to prepare for search kick-off call with client</p> <p><i>Client Kick-Off</i> JTA meets with client/ Board/ and other stakeholders via phone or in-person to gain a mastery level understanding of the search, finalize the job description, sourcing strategy and outline criteria for the Candidate Checklist®</p>	<p><i>Source</i></p> <p>JTA team executes a sourcing strategy through an internet and phone campaign aimed at uncovering a large percentage of passive candidates</p> <p>Source candidates from our industry leading database, including prior searches led</p> <p>Uncover candidates through our connections at relevant industry associations</p> <p>Conduct “original research”</p> <p>Reach out to individuals made aware to us by our client (internal and external candidates)</p>	<p><i>Screen</i></p> <p>JTA Level 1 screen by internet and phone</p> <p>JTA Level 2 screen by the EL via video or in-person</p> <p><i>Present</i></p> <p>Prepare candidate package &amp; status report</p> <p>Present candidate package (resume, checklist and notes to client, and client selects candidates to interview</p> <p>Prepare candidate &amp; client for Interview &amp; manage all parties through the interview process</p>	<p><i>Client overview</i></p> <p>Client interviews (JTA can design and facilitate)</p> <p>Discuss interview outcome</p> <p>Conduct additional interviews as needed</p> <p><i>Selection</i></p> <p>Decision is made to approve/ decline candidate</p> <p>JTA notify candidate of outcome</p> <p>Introduce additional assessment through Hogan partnership</p> <p>Review results</p>	<p><i>Offer</i></p> <p>Confirm offer package to be extended</p> <p>Extend verbal offer and confirm acceptance</p> <p>Initiate and review background checks – if requested</p> <p>Conduct reference checks – deliver a reference report</p> <p>Extend written offer – if requested by client</p> <p><i>Placement</i></p> <p>Collect a copy of the candidate’s written acceptance (needed to close out the search)</p>	<p><i>Post hire</i></p> <p>Submit satisfaction survey</p> <p>Follow up and stay in touch with the hired candidate and the hiring manager to expand the relationship</p> <p><b>Sometimes our clients ask us to do more and sometimes less</b></p> <p><b>Together as a partner we will deliver a customized solution to best support each individual assignment</b></p>

(Proprietary Information contained on this page – exempt from CPRA disclosure)

Some of our Public Agency and Utility Sector Clients



(Proprietary Information contained on this page – exempt from CPRA disclosure)



## Selected Recent Assignments Led by Our Firm

*(We have a 100% placement rate over the past 10 years)*

### CCAs

- Ava Community Energy – Chief Executive Officer (CEO)
- Ava Community Energy – CEO Performance Review w/the Board
- California Community Power – General Manager (GM)
- San Diego Community Power – Chief Commercial Officer
- Silicon Valley Clean Energy (SVCE) – Director Power Services, Director Power Settlements (and more) and served as Advisor to CEO

### Other Public Agencies

- Imperial Irrigation District – Chief Operating Officer
- Imperial Irrigation District – General Counsel
- Frankfort Plant Board – CEO/General Manager
- Oregon Public Utilities Commission – Director/COO Utility Programs
- Oregon Department of Transportation – Chief Operating Officer
- Bonneville Power Administration – Chief Operating Officer

### Investor-owned Utilities in California and Beyond

- PG&E – SVP Asset Management
- PG&E – VP Electric Operations
- PG&E – Senior Director Renewables
- Portland General Electric – Director Origination
- Sempra Energy – Senior Counsel
- CMS and Consumers Energy - VP Renewables and Project Management
- PSEG – VP and General Manager of the Kalaeloa Power Plant

**(Proprietary Information contained on this page – exempt from CPRA disclosure)**



## The J. Tedesco & Associates Team

### **Marla Schneidman, Senior Consultant**

Marla is a 15+ year colleague, and a prior client while working at PG&E, who has since served as a corporate executive recruiter in addition to 10+ years of experience working at multiple retained search firms including J. Tedesco & Associates. Marla has a BA from UCSD and MA degree from the American University. She is based in the San Francisco Bay Area.

### **Jean Farmer, Senior Researcher**

Jean brings 20+ years of research, recruiting and knowledge management experience, Prior to opening up her own firm and working with J. Tedesco & Associates, Jean spent 7 years with Spencer Stuart, a leading international executive search firm as Director of Central Research. Jean is a graduate of DePaul University and resides in the greater Chicago area.

## Jonathan L. Tedesco, Engagement Leader

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Jonathan L. Tedesco, the firm's founder and Managing Director, has 30 years of experience in retained executive search and talent advisory services.

Cell Phone: 312.399.1075

Email: [JLT@tedescoassociates.com](mailto:JLT@tedescoassociates.com)

Mr. Tedesco has served as a sector leader for utilities at Korn Ferry, the largest retained executive search firm in the world. While there, he marketed all of the KF talent offerings, such as DEI, Employee Engagement, and leadership & talent consulting (KF Hay Group), in a collaborative environment. Prior to this assignment, Mr. Tedesco ran J. Tedesco & Associates, which he founded in 1998 and continues today, under the vision that exceptional hires and great customer experience can be achieved through a more attentive, time-efficient, and cost-effective search process. In addition to running his firm, Mr. Tedesco regularly attends energy industry events, and has been an active volunteer, serving on the boards of multiple non-profit organizations. He recently served in an elected position with the City of San Diego's Planning Board, where he advised on issues from urban planning to parks, real estate and water. Mr. Tedesco holds a BA from Pitzer College (Claremont Colleges) and resides in San Diego.

## Our Proposed Fees, Terms and Guarantees

J. Tedesco & Associates' fees are non-contingent and consistent with the gold standards of the profession, set forth by the Association of Executive Search and Leadership Consultants.

### J. Tedesco & Associates Proposed Professional Fee

Our standard professional fee is 33% of the hired candidate's target base salary only (no sign on or other bonuses are included in our fee). In addition, our maximum search fee for public agencies in California is **\$99,000**. The GM salary posted on the NCPA website is \$464,402. At our 33% fee, that would equal a fee of approximately \$153,000, but for this recruitment, our fee will be reduced to our maximum public agency search fee of **\$99,000**, approximately **21.5% of the base salary**.

We will propose a flat fee - meaning that the fee will not change during salary negotiations. The flat fee enables our clients to best budget for this search expense, and it often results in a lower fee and supports our commitment to negotiate candidate salary without impacting our fee.

The total professional fee of **\$99,000.00** is split into 3 equal amounts of **\$33,000**. The first invoice is a non-refundable retainer, billed at search commencement (the date of contract execution). Additional retainer invoices are tied to time increments, billed at 30 and 60 days from search commencement.

### Expenses

- Most search-related expenses are absorbed by our firm with the exception of overnight mail, international phone and consultant travel (air, hotel, meal) - all combined are usually under \$1500 per recruitment. Any such expenses will be approved by NCPA in advance.
- We include the Candidate Checklist assessment for all candidates at no extra cost. We include the Hogan Leadership Assessment for up to 3 finalist candidates at no extra cost. (Any additional candidates assessed through Hogan are at a rate of \$1000/candidate)
- If not handled by NCPA, our firm can serve as a travel agency for candidate travel (reimbursable at cost).

### Our Guarantees

- Our retained search placements (external candidates only) are guaranteed for 12 months. If that individual leaves your organization for any reason other than a company restructuring, we will recommence the search for expenses only until we have re-filled the position or provided a reasonable effort to refill it (up to 4 months of additional effort).
- We will not recruit candidates away your organization for a period of 2 years from the date of the last invoice submitted on this assignment.
- We will only present a candidate to one client at a time - unless the client dismisses interest in that candidate.

# References

## **Girish Balachandran**

Previously served as the CEO at Silicon Valley Clean Energy  
Cell: (408) 690-3117 or email: gb@gbendeavors.com

## **Betsy Andersen**

Mayor of Piedmont  
Serves as an Ava Board Member  
Cell: (510) 604-9864 or email: bandersen@piedmont.ca.gov

## **Karin Burns**

CEO San Diego Community Power  
Cell (415) 518-2698 or email: kburns@sdcommunitypower.org

## **Megan Decker**

Chair Oregon Public Utility Commission (through April 2025)  
Cell: (503) 869-9187 or email:

# Other Information

**Background Checks** - we utilize Checkr as our primary background check platform. It is thorough, geared toward executives, and validates education, past employers and criminal records on both a state and federal level. It is best in class.

**Retention Information** - 100% of our searches over the last 10 years have been successful placements. Tenure varies based on the position, but our agency placements have all been 5+ years.

## **\*\*ACKNOWLEDGEMENT OF AGREEMENT AND STATEMENT OF EXCEPTIONS\*\***

The proposer shall certify that it takes no exception(s) to this RFP, including, but not limited to, NCPA's Consulting Services Agreement, included as Appendix A EXCEPT:

- Scope of Services - Landing page. We recommend that information be shared with NCPA through email (not a portal) - email and our detailed status report is still the current best practice for the sharing of candidate information for GM level recruitments, which requires a coordinated and through review of each candidates.
- 2.6 - We can launch the search immediately and create a timeline that we will adhere to, but we cannot control if board members or candidates are on vacation (or have other conflicts, such as weather-related) which delay the timeline.
- 4.2.2 - We carry all required insurances, but we do not have any company owned/leased vehicles (we have a personal auto policy).

(Proprietary Information contained on this page – exempt from CPRA disclosure)

WE WELCOME THE OPPORTUNITY TO PARTNER WITH YOU!



## Contact Us

### **J. Tedesco & Associates**

4445 Eastgate Mall, Suite 200

San Diego, CA 92121

Phone: 888.326.7735

[www.tedescoassociates.com](http://www.tedescoassociates.com)

### **Team Member Locations**

*West Coast - San Diego and San Francisco*

*Midwest – Chicago and Texas*



**BOB MURRAY  
& ASSOCIATES**

*Experts In Executive Search*

A Proposal to Conduct an Executive Recruitment

for the Position of  
**GENERAL MANAGER**

on behalf of the



1544 Eureka Road, Suite 180  
Roseville, CA 95661  
(916) 784-9080  
(916) 784-1985 fax

September 10, 2025

Mr. James Sheppard, Chair  
Executive Committee  
Northern California Power Agency  
651 Commerce Dr.  
Roseville, CA 95678

Submitted via email to: [Bryna.Bryant@ncpa.com](mailto:Bryna.Bryant@ncpa.com)

Dear Mr. Sheppard:

Bob Murray & Associates is pleased to submit a proposal to conduct the General Manager recruitment for the Northern California Power Agency. The following details our unique qualifications and describes our systematic–yet flexible–method of identifying, recruiting, and screening outstanding candidates on your behalf. Bob Murray & Associates is proud to offer straightforward, *all-in pricing*, eliminating surprises and making the experience simple and stress-free. This proposal includes information on our proven process, a timeline, and a guarantee.

As the premier public sector executive search firm specializing in positions that report directly to elected boards/councils, we understand the unique dynamics, high expectations, and political acumen required of leaders in these critical roles. We don't just fill positions—we ensure the candidates we present to Northern California Power Agency are well-aligned with your organization's goals, values, and culture. Our team is composed of experienced executive recruiters and former public-sector executives—professionals who are passionate about public service and attuned to current trends in government leadership. With over 34 years of experience and a network of more than 40,000 professionals and organizations, we've built a strong reputation for delivering exceptional candidates and achieving repeat success with our clients.

Bob Murray & Associates recognizes that we work at the pleasure of the Executive Committee and our job is to facilitate the Committee in finding the Agency's next General Manager. Our best practice is to establish a strong partnership with the Committee, to ensure the placement of a General Manager who is ideally suited to its needs. In developing this collaborative approach, we will seek the opportunity to meet with the Committee members individually to discuss their expectations for the Northern California Power Agency's new General Manager. The feedback received from Committee will be essential in providing guidance when recruiting and screening candidates for the position.

Current and recent recruitments we have completed similar in scope to your upcoming search include the following:

2025

Silicon Valley Clean Water, CA (General Manager)

West Contra Costa Integrated Waste Management Authority (RecycleMore) (Executive Director)

Elsinore Valley Municipal Water District, CA (Assistant General Manager)

Monterey Peninsula Regional Park District (General Manager)

California Statewide Communities Development Authority (Executive Director)

San Luis Obispo County Air Pollution Control District (Air Pollution Control Officer/Chief Executive Officer)

2024

Glenn-Colusa Irrigation District, CA (General Manager)

West Basin Municipal Water District, CA (Assistant General Manager)

Elsinore Valley Municipal Water District (Director of Engineering)

Western Placer Waste Management Authority, CA (General Manager)

Resource Conservation District of the Santa Monica Mountains, CA (District Manager)

2023

Kinneloa Irrigation District, CA (General Manager)

Valley Water, CA (Chief Operating Officer-Watersheds)

Mountain House Community Services District, CA (Deputy General Manager)

Nipomo Community Services District, CA (General Manager)

California State Association of Counties, CA (Chief Operating Officer)

Sonoma County, CA (Executive Director, Economic Development Board)

Yolo-Solano Air Quality Management District, CA (Executive Director-Air Pollution Control)

We work as a team on every search at Bob Murray & Associates. Your Project Lead would be Valerie Gaeta Phillips or Gary Phillips, who would not only direct and supervise the project team from beginning to end but also serve as the Recruiter for the project as well.

To learn first-hand about the quality of our services and why the majority of our engagements come from repeat and referred clients, we invite you to contact the references listed on page 14 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 with any questions.

Sincerely,

*Valerie Gaeta Phillips*

Valerie Gaeta Phillips

President, Bob Murray & Associates

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## THE RECRUITMENT PROCESS

Bob Murray & Associates' recruiters are specialists in finding positive placements and providing security and fairness to candidates and clients while ensuring the integrity of the search process. Outlined below are the steps in our proven recruitment process, refined through our 34+ years of experience in executive recruiting.

### STEP 1 DEVELOP THE CANDIDATE PROFILE

Our understanding of the Northern California Power Agency's needs will be key to a successful search. Valerie Gaeta Phillips or Gary Phillips will meet virtually with the Committee and key stakeholders to learn as much as possible about the ideal candidate for the General Manager position. Key stakeholders often include:

- Council/Board/Committee Members - up to seven virtual one-on-one meetings with the Recruiter
- Internal Stakeholders (e.g. Department Heads) - up to two virtual group meetings with the Recruiter
- External Stakeholders (e.g. Chamber of Commerce, Community Groups) - one virtual one-on-one or group meeting with the Recruiter

#### *Internal and External Stakeholders*

We find that many of our clients value a recruitment process that opens the opportunity for employees, community members, business leaders, and organization representatives to provide input regarding the ideal candidate. Our recruiters are skilled in virtually facilitating group staff meetings, forums for the business community, and/or town hall meetings that provide for equitable involvement from a variety of constituencies.

If the Northern California Power Agency desires, we will work with the Agency to create a customized virtual community and/or staff input process. *Please note: Virtual facilitation of stakeholder meetings is included in the professional fee. On-site Recruiter facilitation is available for an additional fee - please refer to "Costs and Guarantee" on page 7 for pricing information.*

#### *Online Stakeholder Surveys*

Sometimes clients are seeking input from a wider range of stakeholders—such as community members, business leaders, and organization representatives—online surveys are ideal to solicit input regarding qualities of the ideal candidate. Our experienced recruiters excel at crafting targeted, thoughtful, open-ended questions and can design a customized survey, providing a link for easy sharing on your website. After closing, your dedicated Recruitment Coordinator will send you the survey

response data for your review and analysis. This proposal includes one Online Survey. Additional Online Surveys are available under Optional Services (please refer to page 7).

We want to become familiar with the values and culture of the organization, as well as to understand the current and future issues, challenges, and opportunities in the Northern California Power Agency.

Ms. Gaeta Phillips or Mr. Phillips will review and help define the Agency's wish-list regarding the ideal candidate's personality, management style, knowledge, skills, and abilities and will work with the Agency to identify expectations regarding education and experience. The Agency and Ms. Gaeta Phillips or Mr. Phillips will discuss compensation, benefits, and other key information necessary to ensure that outstanding candidates are attracted to this opportunity. The profile we develop together at this stage will drive subsequent recruitment efforts.

## STEP 2 DESIGN/DISTRIBUTE BROCHURE AND ADVERTISEMENTS

Ms. Gaeta Phillips or Mr. Phillips and your dedicated Recruitment Coordinator will use the candidate profile developed with the Northern California Power Agency to create a professional recruitment brochure, with the assistance of our professional graphic designer. The four-page, full-color brochure will describe the community, organization, position, ideal candidate, and compensation and will include pictures provided by the Northern California Power Agency that you feel best represent your organization and your community.

Upon your approval, Ms. Gaeta Phillips or Mr. Phillips will send the brochure by email (and postal mail if desired) to a targeted audience, personally inviting potential candidates to apply for the General Manager position. We will also place the recruitment brochure on our [website](#), which attracts over 11,000 unique hits weekly and is a trusted resource for candidates seeking executive and professional positions. Two sample brochures are included in this proposal package for your reference.

Ms. Gaeta Phillips or Mr. Phillips will also design an effective advertising campaign appropriate for the General Manager recruitment. Our broadest outreach comes through our active social media involvement on LinkedIn as well as our monthly newsletter where upcoming and current positions are featured. Sources such as *Western City Magazine*, PublicCEO, and the Careers in Government website will be used to reach an extensive local government audience, while position-specific postings will be chosen to attract candidates who have built their careers in and are committed to the General Manager field.

Suggested General Manager-specific advertising sources for the Northern California Power Agency's search include:

- American Public Power Association
- California Municipal Utilities
- Society of Hispanic Engineers
- American Society of Civil Engineers
- Society of Female Engineers

Bob Murray & Associates does not typically place ads with job aggregators or general job posting sites such as CareerBuilder, Monster, or Indeed, as we have found that the broad reach of these sites does not necessarily lead to quality candidates for executive and professional positions.

### *Reaching Diverse Candidates*

Bob Murray & Associates, a woman- and minority-owned business, is **proud of its commitment to attracting and placing diverse candidates**. Nearly 50% of our last 100 placements were women; Hispanic placements 25%; African American placements 13%; Asian placements 21%; and Native American placements at 1%. Not only do we place advertisements with websites designed to attract minority and female candidates, but our President, Valerie Phillips, is a member herself of many diversity-focused organizations including the Local Government Hispanic Network, the League of Women in Government, the Professional Women’s Network, Mexican Professionals, and Women Leading Government. She networks frequently with fellow members to gain insight into which potential candidates are leaders in their field.

Ms. Gaeta Phillips or Mr. Phillips will seek to reach candidates in communities and organizations with demographic profiles and populations served like that of the Northern California Power Agency, to maximize the potential for individuals from a wide variety of backgrounds, cultures, and life experiences to be considered for the General Manager position.

### **STEP 3 RECRUIT CANDIDATES**

The strongest candidates are often those who are successful and content in their current positions and need to be sold on a new opportunity. Our extensive network of contacts, developed through **over 2,100 successful placements**, is a primary source for identifying and obtaining referrals for these candidates. Our in-house database of 40,000 current and former executive and professional candidates is a valuable resource that can only be built over time—time that we have invested into perfecting our process for finding the right candidates for our clients. Our aggressive outreach efforts are focused on phone calls to personally invite potential applicants, answer questions, and allay any reservations, and these efforts are essential to the success of the General Manager recruitment.

#### STEP 4 SCREEN CANDIDATES

Following the closing date for the recruitment, Ms. Gaeta Phillips or Mr. Phillips will screen all resumes we have received, using the criteria established in the candidate profile as a basis upon which to narrow the field of candidates. Internal candidates receive sensitive consideration, and Ms. Gaeta Phillips or Mr. Phillips will discuss with the Agency how the Northern California Power Agency wishes to proceed with these candidates.

#### STEP 5 CONDUCT PRELIMINARY INTERVIEWS

Ms. Gaeta Phillips or Mr. Phillips will personally interview the top 10 to 15 candidates from the resume screening, with the goal of determining which candidates have the greatest potential to succeed in your organization. To reduce travel-related expenses to our clients and increase efficiency in the search process, these interviews are typically conducted via Zoom, Teams, or other convenient videoconferencing applications.

#### STEP 6 SEARCH PUBLIC RECORDS

Under the direction of Ms. Gaeta Phillips or Mr. Phillips, your dedicated Recruitment Coordinator will conduct a review of published print and online articles for each recommended candidate. Sources include Lexis-Nexis™, Google, social media, and our contacts in the field. This will alert Ms. Gaeta Phillips or Mr. Phillips to any further detailed inquiries we may need to make before our recommendations are finalized.

#### STEP 7 MAKE RECOMMENDATIONS

Based on our findings during the preliminary interview process, Ms. Gaeta Phillips or Mr. Phillips will meet with the Agency virtually or on site to share the complete applicant list and recommend a limited number of candidates for your further consideration. Ms. Gaeta Phillips or Mr. Phillips will make specific recommendations and will help facilitate discussions regarding the candidate pool, but the final determination of interviewees will be up to you.

We typically recommend 6-8 candidates that we feel best match your expectations and prepare a detailed report on each candidate. This virtual "Recommended Finalist" eBook is provided to each member of the decision-making body and includes:

- Candidate list with Recommended Finalists identified in *Group 1* and *Group 2* (primary and secondary recommendations), as well as *Internal* candidates
- Summary of experience and education for each Recommended Finalist candidate
- Complete cover letter and resume for each Recommended Finalist candidate

- List of *Other Applicants* (those who did not meet minimum qualifications or were otherwise unsuitable, based on our screening process)

Bob Murray & Associates maintains all search records for a period of seven (7) years following each recruitment, and we are happy to forward cover letters and resumes for each applicant by postal mail or email as soon as the recruitment closes to new applications.

## STEP 8 FACILITATE PANEL 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 work with the Northern California Power Agency to craft and implement an interview approach that fits your needs. This may include panel and/or individual interviews by the Agency; key stakeholders, community/employee interview panels; writing and presentation samples; meet-and-greets; or other specialized process elements Ms. Gaeta Phillips or Mr. Phillips helps the Northern California Power Agency to design.

Ms. Gaeta Phillips or Mr. Phillips will be present on-site during the panel interviews to facilitate as necessary during the process and to guide discussion to consensus regarding final candidates. Bound interview books will be provided for each interview panel member containing:

- Recruitment brochure with candidate profile
- Interview schedule
- Suggested interview questions
- Experience summary, cover letter, resume, and rating form for each candidate
- Ranking forms for use during the panel interview process

We will work closely with your staff to coordinate and schedule interviews. Our goal is to ensure that each candidate has a positive experience, as the way the entire process is conducted will influence the final candidates' perception of your organization.

## STEP 9 CONDUCT BACKGROUND AND REFERENCE CHECKS

Ms. Gaeta Phillips or Mr. Phillips and your Recruitment Coordinator will conduct detailed reference checks for up to two (2) final candidates. 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. In addition to gaining a 360-degree view of candidates from the perspective of their supervisors, subordinates and peers for the past several years, we will make a point of speaking confidentially to individuals who may have further insight into a candidate's abilities but who may not be on their preferred list of contacts.

Your Recruitment Coordinator will work with the two (2) final candidates and our professional backgrounding firm, HireRight, to conduct credit, civil litigation, and motor vehicle record checks and verify candidates' degrees.

## STEP 10 ASSIST IN NEGOTIATIONS

We recognize the critical importance of successful negotiations and can serve as your representative during this process. Ms. Gaeta Phillips or Mr. Phillips know what other organizations have done to put deals together with great candidates and what the current market is like for General Manager positions in organizations like the Northern California Power Agency's. Your Recruiter will be available to advise you regarding current approaches to difficult issues, such as housing and relocation. We will represent your interests and advise the chosen candidate and you regarding salary, benefits, and employment agreements, with the goal of putting together a deal that results in the appointment of your chosen candidate. With our proven experience and vested interest in a positive outcome, we can turn a very difficult aspect of the recruitment into one that is straightforward and agreeable for all parties involved.

## COMPLETE ADMINISTRATIVE ASSISTANCE

We receive many unsolicited testimonials each year from clients and candidates alike noting our prompt, considerate, accurate, and professional service during the search process. Throughout the recruitment, in time intervals that suit the Northern California Power Agency, we will provide you with updates on the status of the search and attend to all administrative details on your behalf.

Candidates receive immediate acknowledgement of their applications, as well as personal phone calls and/or emails (as appropriate) advising them of their status at each critical point in the recruitment. Candidates who receive preliminary or final interviews and are not chosen to move forward in the interview process will receive personal calls from Ms. Gaeta Phillips or Mr. Phillips on behalf of the Northern California Power Agency.

It is our internal company standard that all inquiries from clients and candidates receive a response within the same business day whenever possible, and certainly within 24 hours if the inquiry is received during the work week. Ms. Gaeta Phillips or Mr. Phillips will be available to the Northern California Power Agency by office phone, cell phone, and email at any time to ensure a smooth and stress-free recruitment process.

## COSTS AND GUARANTEE

### PROFESSIONAL FEE AND EXPENSES

The **all-inclusive professional services fee** for conducting the General Manager recruitment on behalf of the Northern California Power Agency is **\$40,000**. Services provided for in this fee consist of all steps outlined in this proposal, including design and distribution of the recruitment brochure, advertising, marketing and promotion, administrative support, public records research, comprehensive background reporting on the final candidates, postage, technology, and three (3) days of on-site meetings. This proposal is valid for 60 days from the date of the proposal.

*Optional Services are listed below and are in addition to the professional services fee. Expense reimbursement for **Consultant travel** related to additional on-site meeting days is billed at the actual rate (airfare/mileage, lodging) and is the responsibility of the Northern California Power Agency.*

The professional fee does not limit the amount of time invested by Bob Murray & Associates in promoting a successful outcome for this project. In fact, our mission for this project is to ensure we assist in identifying the right candidate for the Northern California Power Agency. Therefore, Ms. Gaeta Phillips or Mr. Phillips will contact the Agency at the first anniversary of the placement to confirm an effective transition has occurred.

### *Optional Services*

- **Additional virtual stakeholder meetings:** \$250/meeting
- **Additional on-site meeting days:** \$1,500/day/Consultant, plus travel expenses
- **Online Surveys:** \$500/each (includes preparing recommended questions, preparing and sharing the survey link, closing the survey, and sending the survey response data for your review and analysis)
- **Additional background checks:** \$300/candidate
- **Additional reference checks:** \$500/candidate
- **Additional hires:** \$9,000/candidate

## GUARANTEE

In the event a candidate recommended by our firm resigns or is terminated within the first 12 months of employment, Bob Murray & Associates will provide the Northern California Power Agency with professional services to secure a replacement. Services will be provided at no cost, aside from the following *reimbursable* expenses incurred on the Northern California Power Agency's behalf during the new search:

- Brochure design and distribution (\$695 reprint only, \$1,275 edit/reflow/reprint)(*if needed*)
- Advertising actual costs (estimated at \$2,975)
- Public records search for all new candidates (\$500)
- Background Checks (\$300/candidate)
- Reference Checks (\$500/candidate)
- Consultant travel reimbursement (if travel is needed)
- *Plus any applicable Optional Services, if desired*

In the event that a placement is not made from the initial recruitment, Bob Murray & Associates will provide professional services to conduct one additional recruitment. Services will be provided at no cost. However, the Northern California Power Agency will be responsible for the *reimbursable* expenses as noted above.

We are confident in our ability to recruit outstanding candidates and do not expect the Agency to find it necessary to exercise this provision of our proposal.

## RECRUITMENT SCHEDULE

We are prepared to start work on this assignment upon receipt of a signed professional services agreement or other written, authorized notification. A full search can be completed in 13-16 weeks from the date of initial meetings with our client.

The final recruitment schedule will be determined in collaboration with Northern California Power Agency. A typical timeline of tasks and events is included here for reference.



## FIRM PROFILE

### OUR STAFF

Bob Murray & Associates is a small firm focusing exclusively on executive search services. We have a team of seventeen (17):

- Bob Murray, *Founder*
- Valerie Gaeta Phillips, *President*
- Gary Phillips, *Executive Vice President*
- Joel Bryden, *Vice President*
- Yasmin Beers, *Senior Executive Recruiter*
- Adele Fresé, *Senior Executive Recruiter*
- Stacy Stevenson, *Senior Executive Recruiter*
- Jon Lewis, *Executive Recruiter*
- Stephanie Dietz, *Executive Recruiter*
- Melanie Richardson, *Executive Recruiter*
- Jeff Mori, *Executive Recruiter*
- Michael Ishii, *Executive Recruiter*
- Ian Schmutzler, *Executive Recruiter*
- Alexandria Kopack, *Recruitment and Operations Manager*
- Kathy Lolas, *Senior Recruitment Coordinator*
- Grace Marshall, *Senior Recruitment Coordinator*
- Steph Souza, *Recruitment Coordinator*

Please see your lead recruiter's biography below:

### VALERIE GAETA PHILLIPS, PRESIDENT AND RECRUITER



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. Since joining Bob Murray & Associates, Valerie has completed over 160 searches in a diverse range of fields, including city and general management, planning, finance, human resources, transportation, communication and public relations, community and economic development, information technology, parks and recreation, and operations. She has recruited at all levels of municipal and non-profit organizations, from technicians and engineers to Executive Directors and Chief Executive Officers.

Valerie 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; she is also active in a variety of industry organizations and in diversity-focused associations. Valerie is called upon often to serve

as an expert speaker on topics such as managing one's online reputation, diversity issues in municipal and non-profit leadership, and how to identify a positive placement for the organizational culture.

Ms. Gaeta Phillips, along with Executive Vice President Gary Phillips, has a passion for helping people, evidenced by fundraising, sponsorship, and involvement in raising awareness for organizations such as Autism Speaks, the UC Davis M.I.N.D. Institute, and the Northern California Special Olympics.

#### GARY PHILLIPS, EXECUTIVE VICE PRESIDENT AND RECRUITER



Since joining Bob Murray & Associates, Mr. Phillips has completed over 125 searches for executives and professionals in a wide variety of fields including animal services, city and general management, planning, legal counsel, cyber security, and human resources. Gary's clients have ranged from municipal government to non-profit and private sector organizations, and he has sourced outstanding candidates for positions from the level of division managers up to City Managers, Executive Directors, and General Managers.

Gary 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 that eventually expanded to 13 countries in Europe. He proceeded to hold senior leadership positions in several Fortune 500 companies, with noted successes such as building an organization from two to 250 employees worldwide and growing a company from 800 to 1200 employees.

As part of an executive acquisition and recruiting team, Gary helped build a start-up enterprise software company in San Francisco, recruiting top-notch talent and building a world-class organization. He has maintained customer relationships in the public sector and the private sector, including medical and financial institutions. He prides himself on finding key talent and offering the best customer service to his clients.

Mr. Phillips, along with Ms. Gaeta-Phillips, is involved in his community as a soccer coach, as an organizer of fundraisers for Autism Speaks and the UC Davis M.I.N.D. Institute, and as a sponsor of the Northern California Special Olympics. Mr. Phillips received his Associate of Science degree and completed additional coursework at Rochester Institute of Technology, NY.

## *CORPORATION*

Bob Murray & Associates was founded in May 2000 and operated under the corporation name MBN Services, Inc. until June 2014; our new corporation name is GVP Ventures, Inc., incorporated in California in 2014. Contact information for the corporation and the firm is as follows:

GVP Ventures, Inc. OR Bob Murray & Associates  
1544 Eureka Road, Ste. 180  
Roseville, CA 95661  
(916) 784-9080  
apply@bobmurrayassoc.com

Our corporation and firm are financially sound (and have been so since 2000), with documentation from our accountant available to your organization prior to final execution of a professional service agreement. We have never been involved in any litigation, aside from our personnel serving as expert witnesses when called to do so.

## *PROFESSIONAL ASSOCIATIONS*

Our firm, represented by either our President or our Executive Vice President, are involved in the following organizations to remain engaged with current and future issues relevant to the work we conduct on behalf of clients like Northern California Power Agency:

- California Special Districts Association
- California City Management Foundation (CCMF)
- Engaging Local Government Leaders (ELGL)
- International City/County Management Association (ICMA)
- International Network of Asian Public Administrators (I-NAPA)
- League of California Cities
- League of Women in Government
- Municipal Management Association of Northern California (MMANC)
- Municipal Management Association of Southern California (MMASC)
- National Forum for Black Public Administrators (NFBPA)

Members of our leadership team not only attend events sponsored by these associations but are also frequently called upon to serve as panel members and to provide specialized lectures regarding industry-specific issues. Recent and upcoming speaking engagements and trainings provided by our staff include:

- "Role of the Chief" class, annually presented by Jon Lewis on behalf of the California Police Chiefs Association;
- MMANC and MMASC annual mock interviews;
- Annual League of California Cities Booth; and
- Annual League of California Cities City Manager's Conference (City Manager hosted event).

## REFERENCES

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

**CLIENT:** Calaveras Public Utility District  
**POSITION:** General Manager  
**REFERENCE:** Mr. Adam Brown, Legal Counsel  
(916) 765-5656

**CLIENT:** California Statewide Communities Development Authority (CSCDA)  
**POSITION:** Executive Director  
**REFERENCE:** Mr. Brian Moura, Chairman  
(650) 995-6249

**CLIENT:** Silicon Valley Clean Water, CA  
**POSITION:** General Manager  
**REFERENCE:** Mr. Neil Layton, Council Member  
(650)802-4161

*We appreciate the Northern California Power Agency's consideration of our proposal and look forward to working with you.*





# RECRUITMENT SERVICES



GENERAL MANAGER

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SEPTEMBER 12, 2025

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# I. EXECUTIVE SUMMARY.....

## A. COVER LETTER

SEPTEMBER 12, 2025

Randy S. Howard  
General Manager  
651 Commerce Drive  
Roseville, CA 95678



RE: Northern California Power Agency – General Manager Recruiting Services

It is our pleasure to submit this proposal for recruitment services to secure your ideal candidate to serve as the General Manager of the Northern California Power Agency. **WBCP has worked on many similar recruitments, and we look forward to the opportunity to partner with your organization on this critical position!**

We trust our proposal will showcase our client-focused recruitment process and will act as a testament that we are passionate about what we do to make our clients happy.

WBCP, Inc. was selected, through a national request for proposal process, as the single-awarded vendor for executive recruitment services through a national competitive process conducted by the National Association of Counties (NACo) under the Public Promise Procurement (PPP) program. This cooperative purchasing agreement, with San Diego County serving as the Lead Public Agency (LPA), allows public sector organizations across the U.S. to satisfy competitive procurement requirements and contract directly with WBCP—without the delays or added costs of a traditional RFP process. The PPP/LPA partnership ensures that organizations can engage WBCP quickly, compliantly, and with confidence in the value and quality of service delivered. **Learn more here:** <https://wbcpinc.com/naco>.

It has been proven that great employees are looking for great employers, not just a paycheck. WBCP provides a broader perspective to recruitment services – going beyond securing the ideal candidate – we brand your organization as an employer of choice. We use eye-catching marketing materials, innovative search practices, and responsive and respectful communications with your applicants and stakeholders. **Additionally, we guarantee this placement for 12 months, and we provide a fair and equal recruitment process that also focuses on attracting ethnic and gender-diverse applicant pools.**

WBCP is talented at working with you to identify the strengths, challenges, and opportunities of this job, the ideal candidate, and your community and organizational culture. WBCP will work with your stakeholders to design a recruitment strategy that will include a customized engagement process. We will have a series of meetings, discussions, stakeholder interviews, and survey(s) to get to know you, the organization, the community, the culture, and the staff whom the future General Manager will lead.

My team and I know the California candidate marketplace and have many clients in your region, such as **the City of Roseville, City of Lincoln, Sacramento Area Flood Control Agency (SAFCA), Water Forum, and Sacramento Employment and Training Agency (SETA) (just to name a few)**. We have exceptional experience successfully recruiting for similar positions, with several recent notable recruitments including, but not limited to:

- **General Manager, San Benito County Water District, CA**
- **General Manager, Tuolumne Utilities District, CA**
- **General Manager, Olivehurst Public Utility District, CA**
- **Assistant General Manager – Water Operations, Modesto Irrigation District, CA**
- **Executive Director, San Joaquin Tributaries Authority, CA (SJTA)**
- **Executive Director, California Municipal Utilities Association, CA**
- **Executive Director, Sacramento Water Forum, CA**

**To see a full list of our clients and successful recruitments, visit:** <https://tinyurl.com/8vjkk7w3>

We have over two decades of experience in public sector executive search services and have provided direct search services through WBCP since 2004. WBCP's executive recruiters are all highly personable and have unique backgrounds that make them well-equipped to take on your recruitments, as you will read their biographies in this proposal. WBCP now has offices in California, Oregon, Washington, Texas, and North Carolina.

# I. EXECUTIVE SUMMARY.....

## A. COVER LETTER

Recruiting top talent has become the number-one topic among administrators. New and innovative recruitment strategies are critical to identifying and securing candidates with a deep understanding of how to assess and meet community needs and address future challenges. WBCP understands the complexity of community leadership, and we are prepared to provide a thorough, complete, and fair recruitment process to provide a diverse applicant pool. **Upon our 2024 year-end review, we found that over the last three years 63% of our placed candidates came from diverse backgrounds.** In fact, we are often selected and told that we bring a larger, more qualified and diverse groups of candidates than they have ever received from past professional recruiters.

Clients also choose our firm over others because of our ability to work with your support staff and stakeholder group (including boards, appointed/elected officials, and engaged constituents), manage all details of a recruitment process, and secure great candidates. Our dedication and commitment to the client are complemented by our deep understanding and ability to effectively navigate challenging political climates.

Our clients have great things to say about the quality of the service we provide and the amazing candidates we find them, In fact, many of our clients are return customers. Please feel comfortable reaching out to these organizations to get their feedback directly.

Lastly, we love what we do, and we are passionate about finding exceptional candidates who are also passionate about serving others. WBCP's staff are driven and desire to exceed client expectations. I appreciate your consideration in retaining our services and hope to have an opportunity to work with you in the future.

Enclosed, you will find our comprehensive proposal, which begins with an executive summary and background on WBCP, followed by our qualifications and relevant past recruitments. We outline our recruitment strategy, detailed phases of work, scope, and proposed timeline to ensure a successful process. The proposal also includes the required information: individual qualifications, our fee proposal, professional references, and other supporting details. Finally, we provide acknowledgement of the agreement and our safety compliance documentation.

Best Regards,



Wendi Brown | Founder/President, WBCP, INC.  
[wendi@wbcpinc.com](mailto:wendi@wbcpinc.com) | 541-664-0376  
[www.wbcpinc.com](http://www.wbcpinc.com)

## DIVERSITY

# 63%

*of WBCP candidates  
 placed in positions  
 come from a diverse  
 background*

# I. EXECUTIVE SUMMARY.....

## B. BACKGROUND

**Principal:** Wendi Brown, President/CEO

**Company Legal Name:** WBCP, Inc. (W. Brown Creative Partners)

**Tax ID:** 81-5454037

**Website:** www.wbcpinc.com

**Phone:** 866-929-WBCP (9227) / 541-664-0376

**Address:**

- **Oregon (3 offices including WBCP, Inc. Headquarters):** 213 E Main St., Rogue River, OR, 97537; City of Grants Pass and City of Tigard
- **California (5 offices):** San Jose, Gilroy, Roseville, Los Angeles and Santa Barbara
- **Washington:** City of Seattle
- **Texas:** City of Dallas



### WOMEN OWNED

*WBCP is a 100% women-owned business, an S Corporation, not part of a parent company, and is a registered small business through the US Small Business Administration (SBA). WBCP is registered to do business in all states we serve, and files and pays California S Corporation and personal income tax to the State of California.*

### BUSINESS HISTORY

*WBCP, Inc. has been in business since 2004, and serves nonprofit and public sector organizations. WBCP offers a variety of services, including: partial and full service search services for individual contributor, supervisor, management and executive management positions; human resources consulting: organizational development, training, classification and compensation studies, analysis and assessments, etc.*

## II. QUALIFICATIONS.....

### A. PAST RECRUITMENTS

WBCP has over 20 years of experience providing search services for public sector and non-profit organizations. We have successfully secured professionals and provided other consulting services in **California, Arizona, Colorado, Idaho, Nevada, New York, Oregon, Texas, Utah, and Washington.**

#### CITIES

##### California

- Anaheim
  - Arcata
  - Astoria
  - Atwater
  - Berkeley
  - Calistoga
  - Ceres
  - Colfax
  - Corte Madera
  - Culver City
  - Davis
  - Dunsmuir
  - Fremont
  - Fresno
- Hemet
  - Irvine
  - Laguna Beach
  - Larkspur
  - Lincoln
  - Livermore
  - Livingston
  - Long Beach
  - Milpitas
  - Napa
  - Novato
  - Oakland
  - Orinda
  - Oxnard
- Palo Alto
  - Pasadena
  - Petaluma
  - Pismo Beach
  - Port Hueneme
  - Portola Valley
  - Redding
  - Riverside
  - Rocklin
  - Roseville
  - Sacramento
  - San Francisco
  - San Rafael
  - Santa Maria
- Santa Monica
  - Santa Paula
  - Santa Rosa
  - Solvang
  - Sonoma
  - South Pasadena
  - Sutter Creek
  - Truckee
  - Ventura
  - Vernon
  - Victorville
  - West Hollywood
  - Windsor

##### Oregon

- Ashland
  - Central Point
  - Garibaldi
  - Gold Hill
  - Grants Pass
  - Hubbard
- Independence
  - Medford
  - Phoenix
  - Rogue River
  - Talent

##### Arizona

- Chandler
- Phoenix

##### Nevada

- Boulder City

##### New York

- Rochester

##### Texas

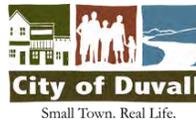
- Fort Worth

##### Utah

- Park City

##### Washington

- Duvall



#### COUNTIES

##### California

- Alameda
  - Colusa
  - Contra Costa
  - Del Norte
  - Fresno
  - Humboldt
  - Lake
  - Los Angeles
  - Marin
  - Mariposa
  - Mendocino
  - Merced
  - Mono
- Napa
  - Nevada
  - Orange
  - Placer
  - Riverside
  - Sacramento
  - San Benito
  - San Bernardino
  - San Diego
  - San Francisco
  - San Joaquin
  - San Luis Obispo
  - San Mateo
- Santa Barbara
  - Santa Clara
  - Santa Cruz
  - Shasta
  - Solano
  - Sonoma
  - Stanislaus
  - Tehama
  - Tuolumne
  - Yolo
  - Yuba

##### Oregon

- Jackson
- Lane

##### Washington

- King

##### Colorado

- El Paso
- Boulder
- Larimer

##### North Dakota

- Cass



## II. QUALIFICATIONS.....

### A. PAST RECRUITMENTS

#### LOCAL AND NATIONAL COUNCILS, BOARDS, DISTRICTS, AND JOINT POWERS AUTHORITIES (JPAS)

**National**

- Hass Avocado Board (HAB)
- North American Blueberry Council / U.S. Highbush Blueberry Council(NABC/USHBC)

**California**

- Bear Valley Community Services District
- Boulder Creek Fire Protection District
- California Prison Industry Authority (CALPIA)
- California Municipal Utilities Association (CMUA)
- Cosumnes Community Services District
- East Bay Regional Communications Systems Authority
- First 5 (Alameda County, California Association, Fresno, Santa Barbara County, San Mateo)
- Los Angeles County Employees Retirement Association
- Los Angeles Unified School District (LAUSD)
- Mendocino County Air Quality Management District
- Metropolitan Transportation Commission (MTC)
- Modesto Irrigation District
- Monterey One Water
- Nevada Irrigation District
- Newark Chamber of Commerce
- Oakland Housing Authority
- Olivehurst Public Utility District
- Orange County Employees Retirement System (OCERS)
- Placer County Transportation Planning Agency (PCTPA)

- Port of Long Beach
- Sacramento Area Flood Control Agency (SAFCA)
- Sacramento Area Sewer District
- Sacramento Employment & Training Agency (SETA)
- Sacramento Public Library Authority (SPLA)
- Sacramento Suburban Water District
- San Benito Council of Governments
- San Benito County Water District
- San Joaquin County Employees' Retirement Association
- San Joaquin Tributaries Authority
- San Rafael Sanitation District (SRSD)
- San Ramon Valley Fire Protection District
- Santa Cruz County Animal Services Authority
- Sonoma County Library
- South Coast Air Quality Management District
- Tri-City Mental Health Authority (TCMHA)
- Truckee-Donner Public Utility District (TDPUD)
- Tuolumne Utilities District
- Valley Consortium for Medical Education (VCME)
- Valley Water
- Water Forum
- West Basin Municipal Water District

**Oregon**

- Jackson County Fire District 5
- Rogue Valley Sewer Services

**Idaho**

- Teton County Joint Housing Authority (TCJHA)



## II. QUALIFICATIONS.....

### A. PAST RECRUITMENTS

#### NONPROFITS

##### National

- Futures Without Violence (Family Violence Prevention Fund)
- Radio Bilingüe

##### California

- Center Point
- Central California Legal Services (CCLS)
- Community Food Bank
- Downtown Streets Team
- Gold Coast Health
- Greater Richmond Interfaith Program (GRIP)

- Northern Valley Catholic Social Service (NVCSS)
- Options Recovery
- Transitions-Mental Health Association
- West Angeles Church of God in Christ

##### Oregon

- Community Works
- Dogs for Better Lives / Dogs for the Deaf

#### PRIVATE ORGANIZATIONS

- CDS Publications
- Central California Truck and Trailer
- Morton & Pitalo
- NAVA
- SWEED
- Tekmanagement
- Touchstone Accounting

#### CONSULTING SERVICES

##### Cities

- Fremont (CA)
- Medford (OR)
- Santa Maria (CA)
- Santa Paula (CA)

##### Counties

- Humboldt (CA)
- Mariposa (CA)
- Santa Barbara (CA)
- San Luis Obispo (CA)



## II. QUALIFICATIONS.....

### A. PAST RECRUITMENTS

#### INDUSTRIES

- Organizational Leadership
- Economic Development
- Facilities & Operations
- Financial, Administrative Services, Accounting, Auditing
- Health & Human Services, Housing, Unhoused
- HR, Risk, Labor/Employee Relations
- Information Technology
- Legal, Counsel, Clerk
- Library
- Marketing, Communications, PR
- Parks & Rec, Community Services, Arts
- Planning, Environmental, Community Development, Building, Transit
- Public Safety
- Public Works, Transportation, Engineering

**BELOW IS A LIST OF SIMILAR RECRUITMENTS WBCP HAS MANAGED:**

**ORGANIZATIONAL LEADERSHIP**

- General Manager, Bear Valley Community Services District, CA
- General Manager, Los Angeles Public Media, CA
- General Manager, Olivehurst Public Utility District, CA
- General Manager, Radio Bilingüe, CA
- General Manager, San Benito County Water District, CA
- General Manager, Santa Cruz County Animal Services Authority, CA
- General Manager, Tuolumne Utilities District, CA
- Assistant General Manager Water Operations, Modesto Irrigation District, CA
- Executive Director, California Municipal Utilities Association (CMUA), CA
- Executive Director, First 5 Association of California, CA
- Executive Director, Water Forum, CA
- Executive Director, San Benito Council of Governments, CA
- Executive Director, Placer County Transportation Planning Agency, CA
- Executive Director, Teton County Joint Housing Authority, ID
- Executive Director, Arts Commission, County of Santa Barbara, CA
- Executive Director, Latino Public Broadcasting, CA
- Executive Director, Northern Valley Catholic Social Service, Redding, CA
- Executive Director, Greater Richmond Interfaith Program, CA
- Executive Director, Options Recovery Services, CA
- Executive Director, Sacramento Employment and Training Agency (SETA), CA
- Executive Director, Pacific Gateway Workforce Innovation Network (PGWIN), City of Long Beach, CA
- Executive Director, Tri-City Mental Health Authority, CA
- Executive Director, First 5 Fresno, CA
- Executive Director, First 5 Santa Barbara County, CA
- Executive Director – Police Accountability Board, City of Rochester, NY
- Executive Director, San Joaquin Tributaries Authority, CA
- Assistant Executive Director, First 5 San Mateo, CA
- City Manager, City of Atwater, CA
- City Manager, City of Boulder City, NV
- City Manager, City of Ceres, CA
- City Manager, City of Colfax, CA
- City Manager, City of Dunsmuir, CA
- City Manager, City of Garibaldi, OR
- City Manager, City of Gold Hill, OR
- City Manager, City of Independence, OR
- City Manager, City of Oxnard, CA

## II. QUALIFICATIONS.....

### A. PAST RECRUITMENTS

#### ORGANIZATIONAL LEADERSHIP (CON'T)

- City Manager, City of Pasadena, CA
- City Manager, City of Parlier, CA
- City Manager, City of Petaluma, CA
- City Manager, City of Phoenix, OR
- City Manager, City of Port Hueneme, CA
- City Manager, City of Santa Maria, CA
- City Manager, City of Santa Rosa, CA
- City Manager, City of Santa Monica, CA
- City Manager, City of Sonoma, CA
- City Manager, City of Talent, OR
- City Manager, City of Tillamook, OR
- City Manager, City of Ventura, CA
- City Administrator, City of Duvall, WA
- City Administrator, City of Hubbard, OR
- City Administrator, City of Rogue River, OR
- Town Manager, Town of Truckee, CA
- Town Manager, Town of Windsor, CA
- Town Manager, Town of Portola Valley, CA
- Assistant City Manager (Municipal Services), City of Sacramento, CA
- Assistant City Manager (Public Safety), City of Sacramento, CA
- Deputy City Manager, City of Long Beach, CA
- Chief Executive Officer, CalPIA (California Prison Authority), CA
- Chief Executive Officer, Downtown Streets Team, CA
- Chief Executive Officer, Newark Chamber of Commerce, CA
- Chief Executive Officer, San Joaquin County Employees' Retirement Association (SJCERA), CA
- Chief Executive Officer, San Joaquin Tributaries Authority, CA
- County Executive Officer, County of Shasta, CA
- County Administrative Officer, San Benito County, CA
- ACAO – Assistant County Administrator, County of San Joaquin, CA
- ACAO/HR Director, County of Mariposa, CA
- ACEO – Assistant County Administrative Officer, County of Santa Barbara, CA
- ACEO – Assistant County Executive Officer, County of Napa, CA
- Chief Operating Officer, Futures Without Violence, CA
- Chief Operating Officer, WBCP Inc., OR
- Chief Operating Officer – IT and Administrative Services, Valley Water, CA
- Chief Operating Officer – Water Utility Enterprise, Valley Water, CA
- Chief Operating Officer/Executive Director, Valley Consortium of Medical Education, CA
- Chief Animal Control Officer, City of Sacramento, CA
- Chief Deputy Director, ISD, County of Los Angeles, CA
- Vice President/Business Development Director, WBCP Inc., OR
- Executive Vice President, Center Point, CA

Check out our full list of  
[recruitments here:](https://tinyurl.com/8vjkk7w3)  
<https://tinyurl.com/8vjkk7w3>

## II. QUALIFICATIONS.....

### B. WHY CHOOSE WBCP

#### RECRUITING WITH DIVERSITY IN MIND

*Since partnering with the country's largest network of diversity job boards, we have seen a 21% increase in diverse applicants and a 13% increase in diverse candidates placed in positions with our clients. This demonstrates WBCP's dedication to expanding outreach and removing barriers to apply, ensuring access to a highly qualified and diverse applicant pool.*

#### 600 Diversity Job Boards:

When you post a job with WBCP, it is automatically shared across 600 diversity job boards, maximizing reach and ensuring access to a wide and inclusive pool of talent. We also utilize the largest diversity database with over 160 million resumes and 15,000 community based organization contacts to expand our search.

#### LinkedIn:

As LinkedIn recruiters, we have access to over 1 Billion profiles, allowing us to evaluate candidates' backgrounds, education, experience, licensure, and more.

#### AI:

WBCP also leverages AI tools to gather additional information to effectively reach future applicants and candidates contact information for emails and phone numbers.

WBCP understands the complexities of meeting the needs of a diverse community, and we provide a thorough, complete, and fair recruitment process.



Streamline and Satisfy the RFP Process to receive recruiting on demand. Reach out to WBCP today for more information.



Scan to learn more!



## II. QUALIFICATIONS.....

### B. WHY CHOOSE WBCP

# WHY CHOOSE WBCP

#### Proven Expertise:

- **Over 20 Years in Business and 100+ Years of Experience:** With over a century of combined experience, our recruitment professionals excel in public service sectors, including cities, counties, utilities, special districts, joint powers authorities, and non-profits. Our proven track record ensures expertise tailored to your needs.
- **100% Success Rate:** In 2024, we achieved a 100% success rate, successfully filling every position we managed including partial and full scope services from engineering, planning, finance, health and human services, legal, legislative, hard-to-fill civil service positions, and many more! We deliver results no matter what the challenge.

**Employer Recognition:** WBCP has been recognized as Oregon's TOP 100 EMPLOYERS.

**HR Teams Trust Us:** We simplify the recruitment process, managing every detail so HR teams can focus on other priorities. From sourcing candidates to scheduling interviews and providing updates, our seamless approach saves time, reduces stress, and ensures results.

**Strategic Marketing and Advertising:** Our marketing team designs targeted campaigns using diverse, cost-effective channels powered by AI. These campaigns maximize reach while staying within budget and include:

- **Diverse Applicant Pools:** Access to over 600 diversity-focused job boards, 15,000 diversity affiliations, and 120 million resumes ensures diversity is integral to our process.
- **LinkedIn Recruiter Expertise:** With access to 230 million U.S. profiles, we connect you with top-tier talent.
- **AI-Driven Talent Acquisition:** Advanced AI strategies enhance efficiency and uncover new candidate engagement opportunities.

**Trusted Partners and Culture Cultivators:** We go beyond finding candidates by building trust with your team and stakeholders. Our tailored strategies align top talent with your organizational culture, ensuring a collaborative and thoughtful recruitment process.

**Recruiting with Competencies:** Ensures a fair, measurable, and effective hiring process. This strategic approach helps identify the client's needs and then assesses candidates on the critical skills and behaviors for success.

#### Benefits:

- **Fairness:** Focuses on role-specific competencies.
- **Measurability:** Provides objective evaluation criteria.
- **Better Matches:** Aligns talent with organizational and cultural needs.
- **Equitable:** Reduces bias with standardized assessments.

Recruiting with competencies delivers high-quality, measurable solutions that ensure the best candidates for your team's success and cultural alignment.

#### Timely and effective background and

**Reference Checks:** WBCP partners with a trusted third party for thorough background checks and relies on a 30-year public safety veteran, retired as a police chief, and an expert in employee investigations, to conduct expert reference verifications. This ensures accuracy, professionalism, and confidence in every hiring decision.

**Guaranteed Satisfaction:** We stand behind our work with a 12-24 month guarantee. If the initial placement doesn't work out, we will conduct a replacement search at no additional consulting fee, ensuring lasting value for your investment.

## II. QUALIFICATIONS.....

### C. RECRUITMENT STRATEGY & PHASES

#### RESUME ASSESSMENT

WBCP will review resumes as they are received and/or at the close of the recruitment. Those candidates determined to be the most highly qualified will be selected for a screening interview.

#### SCREENING INTERVIEWS / REPORT TO CLIENT

WBCP does not restrict the number of applicants or candidates to be screened. Rather, we interview candidates who meet our ideal candidate criteria; frequently this group amounts to 20 candidates, or on average 20% of the applicant pool. Following the completion of the phone screen interviews, we will develop a report/recommended shortlist of candidates, which includes: resumes, cover letters, and a one-page profile summary of candidates' professional history, including a brief overview of WBCP's assessment and the results of their phone screen. We will meet with the selection committee/Client to review this report and select candidates for interviews. In this meeting, we will review the recruitment plan and discuss the final stages of the selection process.



#### COMMUNICATION WITH CANDIDATES

WBCP will take responsibility for communicating with the applicants/candidates during each phase of the search process and Client should refer any inquiries from potential or existing applicants directly to WBCP.

#### SELECTION PROCESS

WBCP will design and administer an appropriate final selection process based on the needs of the Client (tailored to the need and recruitment). WBCP will facilitate the invitation and coordination of these meetings/interviews and provide additional assessment tools/recommendations such as interview questions, writing and presentation exercises, problem solving scenarios, etc.

#### COMMUNICATION WITH CLIENT

Following the interviews and the Client's top candidate(s) selection, we will assist the Client with facilitating a thorough background and reference check. A typical approach includes a review of federal, state, and local criminal background checks and academic verification by a licensed background agency. Reference checks are conducted over the phone by a senior consultant and a final report is provided to the Client. References are completed on candidate(s) being considered after initial/panel interviews.



#### NEGOTIATIONS

Once the client reviews and is comfortable with the findings in the background and reference report, we are available to assist with negotiations on compensation, benefits, start date, and other transition details.

## II. QUALIFICATIONS.....

### C. RECRUITMENT STRATEGY & PHASES

**WBCP knows how to customize your search strategy to meet your unique recruitment needs.** We customize your recruitment based on the specific needs, target audience, and challenges for each recruitment; however, below is a baseline approach for most recruitments.

#### CLIENT & STAKEHOLDER MEETINGS

We require the Client and/or Search Committee, and other stakeholders identified by the Client, be involved in the initial and final phases of this recruitment. These are critical phases to ensure we obtain a clear sense of the priorities and the successful hire of the right candidate. WBCP will meet with various stakeholders as warranted by the Client and the level of the position in the organization. These meetings will allow us an opportunity to gather information and gain knowledge about the organization, community, and unique aspects of the recruitment to design the ideal candidate professional profile, advertising materials, and strategic approach



#### FEEDBACK OUTCOME / TIMELINE DEVELOPMENT

Following the Client/stakeholder meetings, we will develop a detailed timeline for the recruitment along with a proposed advertising plan for approval.

#### CREATIVE DEVELOPMENT

Immediately following the client feedback activities, we will draft the competencies for the recruitment and advertising material/recruitment brochure for the Client's review. This information will summarize what was learned from Client-related interviews and will be used to advertise the opening.

#### MARKETING STRATEGY & IMPLEMENTATION

WBCP will execute a customized marketing/ad plan once the job announcement is created. An ad plan could include the following (based on assumptions), and will be customized based on information gathered in Phase I:

#### DIGITAL ADVERTISING WITH DIVERSITY IN MIND

WBCP utilizes digital advertising to obtain diverse applicant pools, leveraging local and national job boards, associations, and social media. In partnership with a diversity platform, our postings reach up to 600 local employment and diversity websites, connecting across 15,000+ community organizations and niche sites, tapping into a job bank of 2 million resumes. Upon our 2024 year-end review, we found that over the last three years 63% of our placed candidates came from diverse backgrounds.



#### EMAIL & DIRECT MAIL ADVERTISING

In addition to tapping into WBCP's existing pool of potential applicants, we have the capability to access various professional lists. We actively seek out additional lists through associations, contacts, and other strategic channels.

#### SOURCING/HEADHUNTING

WBCP employs a proactive approach by reaching out to targeted individuals and cultivating new connections through referrals from reputable sources. As a LinkedIn recruiter, we harness the power of over 350 million profiles to identify and engage with ideal candidates. Additionally, WBCP utilizes cutting-edge AI tools for precise Boolean searches, enabling us to uncover niche candidates effectively.

#### COMMUNICATION WITH CLIENT

We will provide weekly updates on the progress of this search unless the client prefers more or less frequent communications. We tailor our communications in accordance with our Client's needs.

## II. QUALIFICATIONS.....

### D. SCOPE OF WORK

- Facilitate initial kick-off meeting with Client and other meetings that may include Executive Leadership, staff, community, and other stakeholders to assist with identifying the ideal candidate profile.
- Assist Client hiring authority/stakeholders in modifying the job description (as needed), and develop a recruitment announcement, marketing materials, and advertising plan for the recruitment.
- Attend all other meetings and engagements as needed or identified by the Client.
- Implement advertising plan including: publication, headhunting, direct mail, and other online and email marketing efforts.
- Provide timely updates and progress reports to the client regarding search services; every two weeks or as Client identifies is needed.
- Preliminary internet searches will be conducted on recommended candidates.
- Coordinate interview panel(s) as needed, or coordinate this process with Client.
- Receive and review applicants and screen those applicants to identify top candidates. Top screened paper applicants will be video/phone screened by recruiter to identify the key competencies (technical and interpersonal) to assist in identifying the top group of candidates who will be recommended at the Client/WBCP shortlist meeting.
- Facilitate shortlist meeting with Client – review and select candidates who will be invited to interview.
- Coordinate invitations to candidates.
- Develop interview questions and other selection details to meet specific needs and identify key competencies of candidates.
- Facilitate interviews with panel(s).
- Background and reference checks will be conducted with candidates who are identified as final candidates after initial Client interviews have been conducted. Background checks will be conducted in accordance with local law and typically include the following: criminal (local, state, and federal), education, credit, social security. References will be conducted based on a 360-degree perspective and will include staff, peers, and superiors. Onsite background services are available at an additional fee (see fees for details)
- Facilitate offer and negotiations with selected candidate; as directed by Client.

## II. QUALIFICATIONS.....

### E. RECRUITMENT TIMELINE

*BELOW IS A SAMPLE OF AN EXECUTIVE SEARCH TIMELINE THAT WBCP WILL CUSTOMIZE FOR THIS RECRUITMENT*

#### **Week 1:**

- Secure services with search firm, WBCP, Inc.
  - WBCP can schedule a Kickoff meeting as soon as we are selected.
- WBCP: review search parameters and recruiting processes with Client
  - Interview with hiring authority and other stakeholders for competencies
  - Identification of advertising venues and ideal candidate prospects
  - Calls, meetings, or coordination with other stakeholders for information gathering

#### **Weeks 1 + 2:**

- Develop and approvals: recruitment process, deadlines, ad plan and strategy, recruitment timeline and brochure
- Print coordination (if applicable)

#### **Weeks 2 + 3:**

- **OPEN RECRUITMENT AND AD PLAN:** Implement marketing plan and direct mail (if applicable)
- Secure panel member calendars
- Timeline may be extended if direct mail piece is included (i.e., print/postage)
- Finalize panel members and interview logistics and invitations to panel members

#### **Weeks 4, 5, + 6:**

- Receive applications –Collect and source applicants will continue until recruitment closes

#### **Weeks 7 + 8:**

- **CLOSE RECRUITMENT AND ADVERTISING**
- Conduct initial phone screen to identify shortlist of candidates
- Preliminary check on shortlist candidates (Google search)
- Candidate profiles developed and short list recommendations to client

#### **Weeks 9 + 10:**

- **MEETING – Client confirms selection of candidates to be advanced to panel interviews**
- Finalize questions, presentation, in-basket (as determined)
- Coordinates invitations with selected top candidates (shortlist)
- Produce panel candidate interview packets

#### **Weeks 10 + 11:**

- WBCP facilitates interview process – Interview process will be customized based on client and community needs:
  - **Day 1: Panel Interviews Conducted; Day 2: 2nd Interviews with executive leaders;**
  - 3rd interviews may be scheduled as needed with Boards/Commissions, etc.;
  - As needed schedule staff and/or community discussions/meetings

#### **Week 12:**

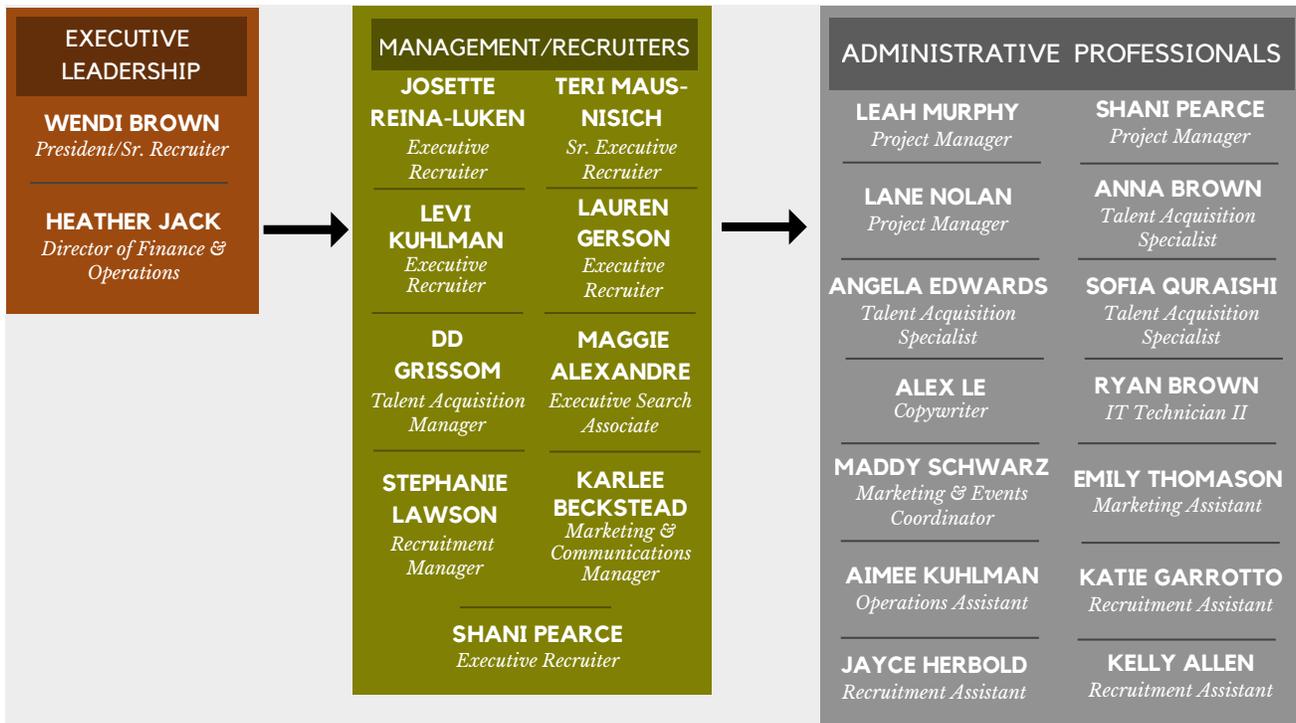
- WBCP conducts background and reference checks (backgrounds may be conducted by Client if current contract exists)
- WBCP conducts full reference checks for candidate(s) selected for Board/Commission interviews; or when Client is interested in making an offer

#### **NEGOTIATIONS / HIRE:**

- Hire date to accommodate possible candidate relocation
- Client (WBCP available to assist in process) conducts offer and facilitates salary negotiations with preferred candidate

### III. REQUIRED INFORMATION.....

#### A. ORGANIZATIONAL CHART



CREATIVE PARTNERS / SENIOR ADVISORS				
<b>BRUCE GRIFFITHS</b> <i>Organizational Development/ IO Psychologist</i>	<b>STEVE BROWN</b> <i>National Account Manager</i>	<b>BILL LANDIS</b> <i>Public Safety Investigator</i>	<b>ALAN ROSEN</b> <i>Executive Recruiter/ Sr. Facilitator</i>	<b>BERNIE LICATA</b> <i>Organizational Development Consultant</i>
<b>SCOTT BECKSTEAD, JD</b> <i>Sr. Advisor</i>	<b>MIKE LUKEN</b> <i>Sr. Facilitator</i>	<b>WILLIAM RACOWSCHI</b> <i>Fire/Public Safety</i>	<b>CHRISTY WURSTER</b> <i>Sr. Facilitator</i>	<b>RIVKAH SASS</b> <i>Retired Library Director/Sr. Facilitator</i>
WBCP STATISTICS				
WBCP is a 100% woman-owned business. Staff and consultants are a diverse mix of gender/ethnicity Age ranges from 24 - 70+				



### III. REQUIRED INFORMATION.....

#### B. INDIVIDUAL QUALIFICATIONS

**WENDI BROWN**  
*Lead Consultant/  
Sr. Executive  
Recruiter*



I am the President of WBCP, with over 20 years of experience in marketing and advertising and combine this with my background in recruiting to successfully place hard-to-fill, management, and executive positions. My team and I are passionate about helping organizations improve their recruitment services, place great talent, conduct department assessments, redesign antiquated processes, revise job descriptions, conduct salary and benchmark studies, and more. I have worked in various industries – advertising and public relations, national real estate franchisor, global manufacturing – and I have worked with nonprofit and public sector organizations since 1999. Formerly, I was an internal Human Resources Consultant for the County of Orange, California, providing countywide communications, human resources, executive search, and recruiter training services to the Assistant Chief Executive Office/Human Resources Director and, at that time, 25 decentralized departments, with 17,000 employees, serving a community of 300,000. I have a Bachelor’s of Science in Business Administration with an emphasis in Marketing from Colorado Technical University; have earned several certificates in Project Management, Global Business, Marketing, and Human Resources; and working toward a Master’s in Management at Southern Oregon University.

**TERRI MAUS-NISICH**  
*Sr. Executive Recruiter*



Terri Maus-Nisich holds a pivotal role as one of our Senior Executive Recruiters, leveraging her extensive background as a distinguished leader in local government. With a local government career spanning over 40 years, Terri's journey includes transformative roles within the County of Santa Barbara, where she ascended from Parks Director to Assistant County Executive Officer, overseeing vital municipal and health/human service departments. Her remarkable impact encompasses leadership in Homeless Services, Communications, and Emergency Management, driving community engagement, disaster recovery, and support for vulnerable populations. Before her tenure in Santa Barbara, Terri spent 15 years with the City of Santa Clarita in roles ranging from analyst to Deputy City Manager. Throughout her remarkable career, Terri prioritized strategic planning, organizational development, and innovative problem-solving, garnering numerous awards. She holds a Bachelor’s Degree from UC Santa Barbara, a Masters of Public Administration from Cal State Northridge, and a graduate certificate from Harvard University’s JFK School of Government.

### III. REQUIRED INFORMATION.....

#### B. INDIVIDUAL QUALIFICATIONS

**LAUREN GERSON**  
*Executive Recruiter*



Lauren Gerson is a seasoned Executive Recruiter at WBCP, where she draws on over 15 years of experience in career services, customer relations, and operations. Her recruiting expertise extends across various industries, with notable success in health and human services, utilities, and finance. Lauren has helped organizations across multiple states fill hard-to-hire positions at every level, from individual contributors to executives. Lauren’s diverse professional journey began in operations and events management, where she honed her expertise in human resources, business management, and regulatory compliance. She later transitioned to career services, and prior to joining WBCP, worked with a career coaching company helping job-seekers better leverage their skills and overcome barriers to employment. Lauren holds a Bachelor’s degree in Philosophy from Whittier College. She brings a unique perspective to her role, and is committed to making a positive impact both professionally and personally. With her unwavering dedication and client-centric focus, Lauren continues to drive success and excellence in executive recruitment at WBCP.

**LEVI KUHLMAN**  
*Executive Recruiter*



Levi Kuhlman is an Executive Recruiter at WBCP, and an experienced professional with a multifaceted career spanning across executive recruitment, real estate, and entrepreneurship. He has worked extensively with local municipalities, special districts, and not-for-profit organizations across the Western region, with a focus in California, Oregon, and Idaho. Levi has conducted many successful recruitments in various industries including planning, rent stabilization and housing, engineering, finance, city management, transportation and transit, community development, building and safety, public safety, risk management, and information technology. Levi serves as a skilled and diplomatic liaison, earning a reputation for his personalized approach to recruiting. Before joining the ranks of WBCP, he advocated on behalf of tenants, landlord, and clients. With a diverse skill set and a commitment to excellence, Levi continues to make significant contributions to WBCP, his clients, and broadening the professional community one recruitment at a time.

### III. REQUIRED INFORMATION.....

#### B. INDIVIDUAL QUALIFICATIONS

**JOSETTE REINA-LUKEN**

*Executive Recruiter*



Josette, an Executive Recruiter at WBCP, specializes in government finance and the water industry with nearly 30 years of experience. Her career began in IT, managing software implementations and leading training and sales teams. After earning her MBA, she transitioned to municipal agencies, holding various management positions, including Administrative Manager and Financial Manager. With expertise in budgeting, strategic planning, and organizational development, Josette has made significant contributions to the agencies she's served. She holds a Bachelor's Degree in Political Science/Public Administration from the University of South Florida, an MBA from the University of Phoenix, and certificates in Human Resources from the California State University and Leadership from the University of Davis.

**SHANI PEARCE**

*Executive Recruiter*



Shani Pearce brings over 15 years of corporate and public sector experience to her role as an Executive Recruiter at WBCP, with a background spanning executive support, human resources, project management, and regulatory compliance. She began her career with the City of Medford, working closely with executive leadership on labor relations, wellness initiatives, recruitment, and large-scale events. In the private sector, she advanced as a Human Resources Business Partner, specializing in recruitment, training, and organizational development, before joining a multi-billion-dollar, multi-state energy company where she progressed into project management, overseeing compliance, licensing, permitting, and stakeholder engagement. Alongside her corporate work, Shani co-founded a wedding and event business, further demonstrating her creativity and logistical expertise. At WBCP, she brings this diverse experience to lead recruitment processes, engage with clients, source candidates, and ensure a seamless candidate experience, making her a trusted partner to clients and a valued member of the WBCP team.

REVIEW OTHER EMPLOYEES & CONSULTANT PARTNERS ON OUR WEBSITE:  
[WWW.WBCPINC.COM/WBCP-TEAM](http://WWW.WBCPINC.COM/WBCP-TEAM)

### III. REQUIRED INFORMATION.....

#### C. FEE PROPOSAL

*WBCP will not limit the number of hours we work on a recruitment, rather we charge a flat rate and will spend the time necessary to ensure we are successful. Consulting fees will be billed in thirds at the beginning (open for applications and advertising campaign launched), middle (shortlist selection), and end of the recruitment process (selection made and background/ references concluded).*

#### SERVICE COST PER RECRUITMENT GENERAL MANAGER

Description of Services/Deliverables:	Inclusive Rate per Recruitment:
<b>Consulting Services:</b> Phases I-IV in the proposal's recruitment strategy/phases section.	\$24,900
<b>Expenses Include:</b> Travel to client location (up to 2 trips); document shipping fees/delivery charges to facilitate virtual meetings, panel packet content; fees for background and reference checks; may include fee for one additional consultant to travel (and related expenses) and facilitate an additional panel for one day (\$700/day); brochure/graphic design (\$950); marketing and advertising which may include: print and postage (if applicable); online job boards; social media; sourcing; and may include flat fee pricing for: LinkedIn \$395, InMails \$300, Circa Diversity Job Boards \$295, Zoom Info \$299. These expenses will be billed based on what is expended and based on the needs of the client/recruitment.	Up to \$5,500 - \$7,900 (direct expenses not-to-exceed)

#### Additional Cost

Upon request, WBCP can coordinate candidate travel and related expenses. Since this service falls outside of the standard scope of work, clients who choose this option should anticipate an estimated travel reimbursement of up to \$1,500 per non-local candidate. This estimate typically covers lodging, primary transportation, and/or a stipend.

#### Timeline Policy

To ensure the success and efficiency of our recruitment services, the following policies regarding cost and timelines are in place:

1. **Timeline Development:** Timelines provided to our clients are valid for **10 business days**. If a timeline is not secured or confirmed within this period, it may no longer be available. In such cases, the timeline may be reassigned to another client, and a revised timeline will be provided.
2. **Work Performed Out of Scope:** To deliver optimal results, adherence to agreed-upon dates and times for critical recruitment milestones (e.g., shortlist meeting and interview dates) is required. Any changes to these timelines after the recruitment process has commenced may result in:
  - a. **Forfeiture of the Recruitment Guarantee:** Deviating from the agreed timeline will void the recruitment services guarantee.
  - b. **Additional Charges:** Adjustments to timelines will incur additional fees, billed at our standard hourly rate.

#### Proposal Negotiations

*While our standard pricing reflects the value and quality of our recruitment services, we recognize that each client's needs are unique. As such, we are open to discussing pricing options and also offer flexible partial search services that can be tailored to meet your specific requirements.*

### III. REQUIRED INFORMATION.....

#### C. FEE PROPOSAL

WBCP Inc. provides either a placement guarantee, or a replacement guarantee as determined by the recruitment outcome and defined below:

**Successful Placement Guarantee:** We guarantee a successful placement and will provide continued consulting services for one additional recruitment at no extra consulting fee. The client will be responsible for any direct expenses.

**OR**

**Replacement Guarantee:** If a candidate selected and appointed by the client leaves their position for any reason before completing **12 months** of service, WBCP will provide consulting services at no additional cost to secure a replacement. The client will be responsible for any direct expenses. This guarantee applies to one replacement within one year of the candidate's departure.



### III. REQUIRED INFORMATION.....

#### D. REFERENCES & MARKETING MATERIALS

##### 1-San Benito County Water District, California

**Similar Position Filled:**

- General Manager

**Contact Information:**

- Cindy Tyler, HR Analyst - [ctyler@sbcwd.com](mailto:ctyler@sbcwd.com) | 831-637-8218

##### 2-San Joaquin Tributaries Authority, California

**Similar Position Filled:**

- Executive Director

**Contact Information:**

- Jennifer Persike, President/Founder, JP&CO - [jp@jenniferpersike.com](mailto:jp@jenniferpersike.com) | 916-296-3981

##### 3-California Municipal Utilities Association (CMUA), California

**Similar Position Filled:**

- Executive Director

**Contact Information:**

- Craig Miller, President, Board of Governors - [cmiller@wmwd.com](mailto:cmiller@wmwd.com)

*Click below to see our marketing samples for similar positions. To see all of our brochures, visit: [wbcpinc.com/closed-jobs-private/](http://wbcpinc.com/closed-jobs-private/) and use the password: wbcp202510\**

- [General Manager, San Benito County Water District, CA](#)
- [General Manager, Tuolumne Utilities District, CA](#)
- [General Manager, Olivehurst Utilities District, CA](#)
- [Assistant General Manager of Water Operations, Modesto Irrigation District, CA](#)
- [Executive Director, San Joaquin Tributaries Authority, CA](#)
- [Executive Director, California Municipal Utilities Association, CA](#)
- [Executive Director, Water Forum, CA](#)
- [Director of Power Systems, Nevada Irrigation District \(NID\), CA](#)

### III. REQUIRED INFORMATION.....

#### E. OTHER INFORMATION

##### **BACKGROUND CHECKS**

Following the interviews and the Client's selection of top candidate(s), **we facilitate a comprehensive background and reference check process.** Our standard approach includes federal, state, and local criminal and civil background checks, as well as academic verification conducted by a licensed background agency.

For references, **our senior investigator—who has a professional background in public safety—conducts in-depth phone interviews.** We take a 360° approach, gathering insights from supervisors, peers, and staff to provide a well-rounded perspective. A detailed final report is then delivered to the Client.

##### **RETENTION RATES**

Over the past decade, approximately **87%** of WBCP's City Manager placements have remained with their agency for at least two years, with only **13%** leaving or unconfirmed.

##### **INSURANCE**

WBCP and its sub-consultants have reviewed the contractual agreement and the Insurance Requirements. If selected, WBCP will execute said agreement and will provide the required insurance documents. WBCP will submit certificates of insurance as evidence of the required coverage limits. Insurance policies include: liability, errors and omissions, workers compensation, and vehicle insurance.

##### **CONFIDENTIALITY SAFEGUARDS**

Confidentiality is paramount in the work we do. We ensure that the client and candidate information we receive, and conversations with our client (and certainly discussions in closed session) are kept confidential. There are several physical safeguards we have in place including: locked and alarmed office space, password, and encryption protected information on our computers and servers, multiple backup systems. As information is shared with our client, we discuss the importance of confidentiality and why it is important to the candidates they are considering but also brands the organization appropriately. We also ask candidates who are interviewed to keep candidate information confidential, as they may see or meet a candidate during the process. We emphasize that confidentiality is not just until the recruitment is completed, and a candidate is hired, confidentiality is in perpetuity. Leaked information is not a reputation that a client wants to receive, as this could deter future applicants from applying.

##### **ORGANIZATIONAL DIVERSITY STATEMENT**

WBCP embraces cross-cultural diversity and we are committed to equitable treatment and elimination of discrimination in all its forms at all organizational levels and throughout all consulting practices, including search services. We strive to reach diverse groups of people to inform them of leadership opportunities. Upon our 2024 year-end review, we found that over the last three years, 70% of our applicants and 63% of our placed candidates came from diverse backgrounds. We will make extensive efforts to attract a qualified applicant pool that represents a broad range of gender and ethnically diverse individuals.

##### **FORCE MAJEURE**

Client agrees that WBCP, Inc. is not responsible for any events or circumstances beyond its control (e.g., including but not limited to war, riots, embargoes, strikes, and/or Acts of God) that prevent WBCP, Inc. from meeting its obligations under this Agreement.

### III. REQUIRED INFORMATION.....

#### F. ACKNOWLEDGEMENT OF AGREEMENT & STATEMENT OF EXCEPTIONS

WBCP requests an **exemption** to the Automobile Liability insurance requirement of \$2 million as listed in the sample contract. We ask for a \$1 million Automobile Liability limit instead. As WBCP would be providing recruitment services, under this RFP, the additional automobile coverage isn't necessary, as we aren't driving as a part of these services. Additionally, \$1 million is the max that our current provider is able to offer.

WBCP requests an **exemption** to the requirement of providing preliminary references on at least 10 candidates at the shortlist stage. We do not recommend conducting references this early in the process, as it can create confidentiality concerns for candidates who may not want their current employers to be aware they are seeking new opportunities. Instead, WBCP conducts in-depth reference checks later in the process with the selected candidate. Should the client request additional references beyond the first two finalists, these may be provided at an additional cost of \$950 per candidate.

WBCP requests an **exemption** to the requirement under Section 2.1 to provide detailed time entries and hours worked by each consultant, employee, agent, or subcontractor. WBCP charges a flat rate per recruitment and does not track or bill by hours. We do not limit the amount of time spent on a recruitment; rather, we dedicate the time and resources necessary.

WBCP affirms compliance with all other terms and conditions outlined in the RFP and sample agreement, with the exception of the specific exemptions noted above.

#### G. SAFETY COMPLIANCE

Please see attached Certificate of Liability Insurance.



\_\_\_\_\_  
Wendi Brown, President

\_\_\_\_\_  
SEPTEMBER 12, 2025

Date

\_\_\_\_\_  
Client, Title

\_\_\_\_\_  
Date



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
09/11/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

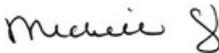
<b>PRODUCER</b> Hart Insurance Agency PO Box 1240 Grants Pass OR 97528	<b>CONTACT NAME:</b> Michelle Ely (541)
	<b>PHONE (A/C, No, Ext):</b> 779-4232 <b>FAX (A/C, No):</b> (541) 772-3963 <b>E-MAIL ADDRESS:</b> mely@hartinsurance.com
<b>INSURER(S) AFFORDING COVERAGE</b>	
<b>INSURER A:</b> Hartford Casualty Ins Co	<b>NAIC #</b> 29459
<b>INSURER B:</b>	
<b>INSURER C:</b>	
<b>INSURER D:</b>	
<b>INSURER E:</b>	
<b>INSURER F:</b>	

**COVERAGES**      **ME**      **CERTIFICATE NUMBER:** Cert ID 32734 (129)      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR VVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	\$ \$ \$ \$ \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED <input type="checkbox"/> AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	\$ \$ \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED    RETENTIONS \$						EACH OCCURRENCE AGGREGATE	\$ \$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	52WECAN1HPC	09/01/2025	09/01/2026	<input checked="" type="checkbox"/> PER <input type="checkbox"/> OTH-	E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEES \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
								\$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

<b>CERTIFICATE HOLDER</b>  Northern California Power Agency  651 Commerce Dr  Roseville CA 95678	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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**Korn Ferry's Response To  
Northern California Power  
Agency's (NCPA) RFP For  
Executive Recruitment Services  
for General Manager**

**SEPTEMBER 16, 2025**



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## INTRODUCTION: EXECUTIVE SUMMARY AND QUALIFICATIONS OVERVIEW

On behalf of Korn Ferry, we are delighted to present our credentials and approach for conducting the GM leadership succession search for NCPA. If we are selected to lead this engagement, this search will be led by Shelly Fust who will be joined by Peter Bogin on the execution of the engagement. Shelly and Peter are both Senior Client Partners at Korn Ferry who together have over 50 years of combined search experience in the energy sector. Both of us are familiar with NCPA and the work that it does as a California Joint Action Agency providing comprehensive utility services to its 16 member agencies, including financing, constructing, and maintaining a fleet of 850W of power generation assets valued at over \$1 billion, along with PPA's, in support of its member's needs. We also understand that NCPA provides additional utility services to other non-member agencies, including scheduling their generation resources into the Western power markets. Shelly is the California-based Korn Ferry consultant who conducted the search that placed Randy Howard in his current role at NCPA in 2014.

Shelly and Peter are also known to Randy in his capacity representing the public sector utilities on the Nominating Committee for CAISO's Western Energy Market Governing Body Member searches that Korn Ferry has conducted for the last 4 years. We worked closely with Randy earlier this year when he chaired this Committee for the search we conducted for WEM earlier this year.

We believe that our unique combination of relevant knowledge of NCPA and the markets in which it operates, and our broader energy utility executive search experience as detailed in this RFP response, provides us with the extensive network of current executives in both the public power and IOU utility industry that we would leverage for sourcing highly qualified GM talent for NCPA. Our industry knowledge and relevant search experience also gives us the ability to accurately and thoroughly assess the potential GM talent required to meet the demands of the complex and challenging role. As outlined in your GM Job Description, NCPA's GM requires a strong mix of technical, operational, legal, policy, financial and capital-intensive infrastructure project acumen. NCPA's next GM, as you also accurately specify and as Randy has demonstrated well on behalf of your organization, will also need to have the strong leadership agility skills required to identify new, cost-effective ways to convene and serve the needs of NCPA's member and non-member agencies. These leadership agility skills are essential for NCPA's GM to engage proactively with critical external constituencies throughout the West Region, such as the CAISO/WEM, to continue to help the Western energy market evolve to meet increasing demand, deliver on cost and operational efficiencies required by NCPA's members to help them meet their objectives of decarbonizing their power supply and mitigating increasing operational and financial risks.

**The following is an overview of our Korn Ferry credentials and approach for conducting this important NCPA GM leadership succession search. We understand that the goal is to identify and onboard the new GM within the first quarter of 2026. We are available and prepared to execute this engagement within this timeframe and with the commitment of ensuring a successful completion if selected.**

Thank you for your consideration of our credentials.



**Shelly Fust, Senior Client Partner, Korn Ferry, 1900 Avenue of the Stars, Suite 1225, Los Angeles, CA 90067**



*Korn Ferry (US) is a wholly-owned subsidiary of Korn Ferry, a publicly traded company headquartered in Los Angeles, CA and listed on the New York Stock Exchange under the symbol "KFY". Korn Ferry operates in 111 offices in 53 countries, helping us deliver our solutions globally, wherever our clients do business. As of April 30, 2025, we had over 8,000 full-time employees, including over 3,000 consultants and execution staff.*

***As a global organizational consulting firm, we bring together strategy and talent to drive superior performance for our clients.***

***Our purpose is to help people and organizations exceed their potential.***

# KORN FERRY'S ENERGY PRACTICE:

**Korn Ferry's Energy and Utility Practice is a highly specialized global group of professionals who have significant knowledge of, and deep relationships with, energy and water utility executives across industry sub-sectors in major geographic capitals. Our detailed knowledge of the community enables us to deliver high-quality, fast, and targeted search solutions.**

### Perspective

Our Energy/Utilities Practice team members can provide a unique perspective by integrating sector expertise (public and private utilities) with relevant prior industry experience.

### Global reach

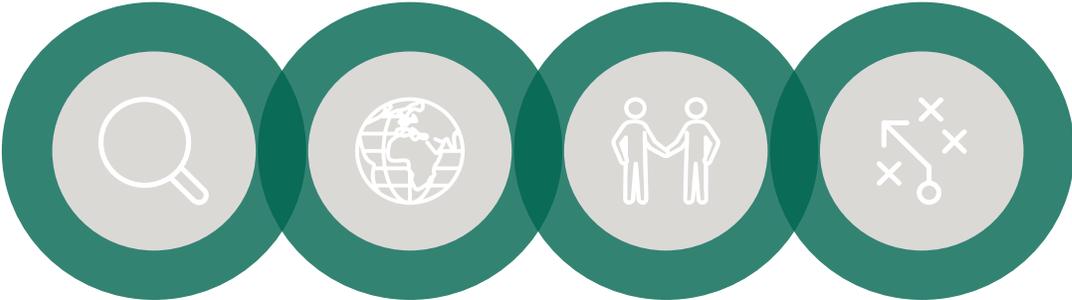
We have 100+ practice members located in major energy hubs including Los Angeles, New York, Houston, Calgary, London, Singapore, Dubai, Sao Paulo, Buenos Aires, New Delhi, and New Mexico.

### Network scale

Our deep industry relationships and global network allows us to quickly identify, qualify and cross-reference candidates from different geographies and functional backgrounds.

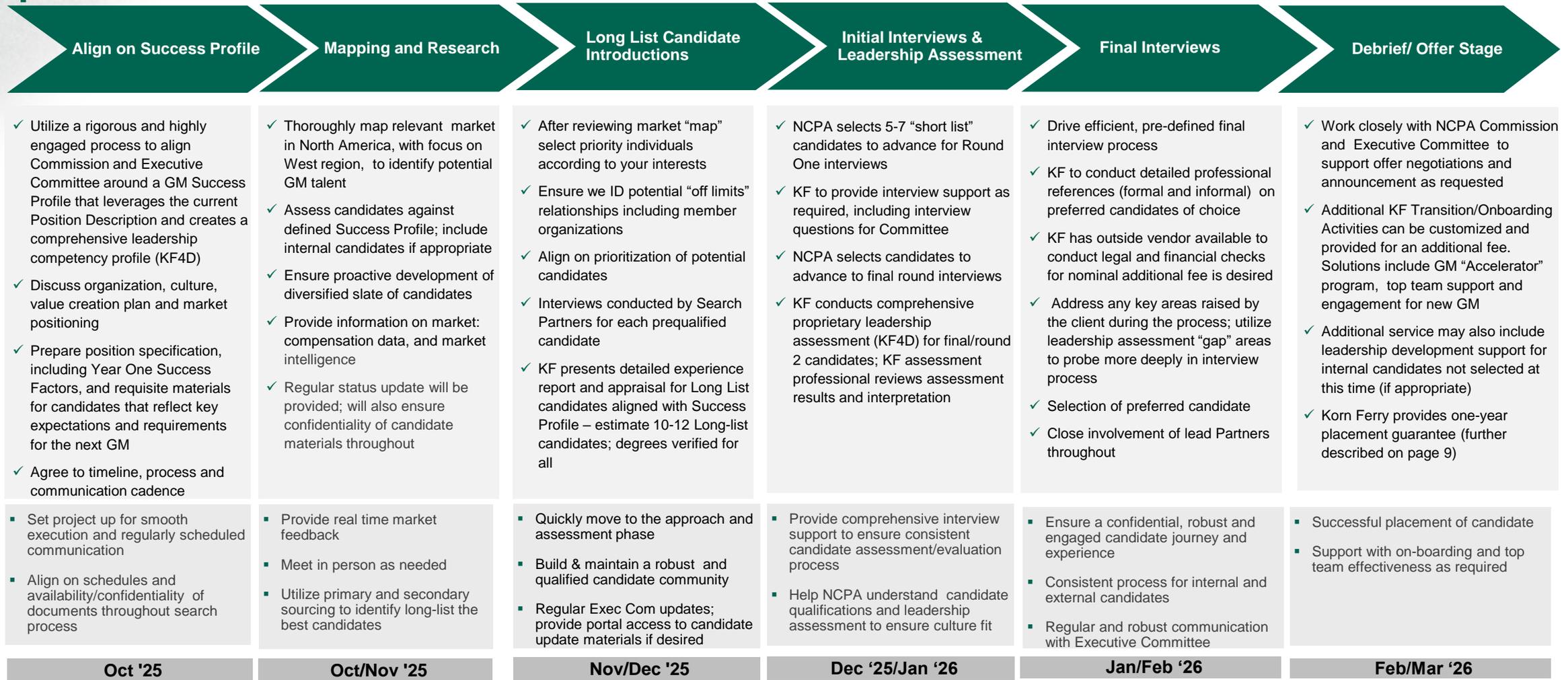
### Functional expertise

We have placed executives and professionals across a wide variety of functional areas including top executives in operations, finance, IT, legal, technology, human resources and more.



# PROPOSED NCPA GM SEARCH PROCESS AND TIMELINE :

Timeline and process will be adapted to meet your desired search recruitment requirements



## ADDITIONAL SEARCH SCOPE OF SERVICES RESPONSES:

### ■ Review of Current Job Description:

- ✓ Much of the current job description follows the content and format utilized by Korn Ferry for the successful GM search conducted for NCPA in 2014. However, if selected to lead this new search, we would work closely with the Executive Committee (and NCPA Commission as appropriate) to also define Year One Success factors – identifying those 4-5 key goals that the new GM would need to achieve to be considered successful in their first year. This creates a helpful dialogue with candidates regarding expectations of the Commission for the GM in their first year.
- ✓ We would also work with the Executive Committee to update the GM Leadership Profile (Traits, Drivers and Competencies) utilizing our current proprietary leadership assessment (KF4D) tool. This process will also map, and/or update as required, the desired competencies outlined by you in the current Job Description with our current model that will be used to assess fit for all finalist candidates.

### ■ Commitment to delivering a diverse slate of qualified candidates:

- ✓ At Korn Ferry, we work hard to bring forward candidates of diverse backgrounds who possess the exceptional qualifications and abilities for consideration on every engagement. Korn Ferry complies with Equal Employment Opportunity regulations. Staff are trained on its requirements annually.
- ✓ Our robust energy sector knowledge and network facilitates a broad and expedited reach into the market to source the most qualified and broadly-defined diverse talent (gender, ethnicity, experience and thought). Through our focused diversity search and consulting organization, we know and will access relevant individuals and organizations to proactively engage diverse candidate communities in organizations such as: Society of Black Engineers; Women in Energy; Energy and Environment; National Utilities Diversity Council, etc.
- ✓ Our results in placing ethnic minority and female CEO/GM, Board and other executive candidates speak for themselves.
  - **Over 85 percent of recent public sector utility searches** resulted in ethnic and/or gender diverse placements.
  - **90+ percent of recent utility searches led by this team** resulted in diverse placements.
  - Korn Ferry **produced diverse finalist candidates on 100% of US utility CEO and General Manager searches** conducted in the past five years.

### ■ Health and Safety Policy:

- ✓ Korn Ferry provides professional services that comply with all domestic and international legal and regulatory requirements relevant to the regional location associated with the delivery of our Services. Korn Ferry's Code of Business Conduct and Ethics requires all employees to comply with all applicable laws and adhere to the relevant professional standards; Workers Comp Insurance policy provided later in this document.

### ■ Candidate Landing Page:

- ✓ As requested in the RFP, Korn Ferry will develop a landing page that is password protected to host candidate completed questionnaires and resumes. The confidential landing page will be accessible to the Executive Committee and designated staff.

## ADDITIONAL SEARCH SCOPE OF SERVICES RESPONSES [CONT.]

### ▪ **Retention Statistics:**

- ✓ Korn Ferry does not maintain a comprehensive data base of retention statistics. Forbes Magazine has named Korn Ferry as America's best recruitment firm for 8 of the past 9 years, most recently in May 2025. We work hard to maintain this reputation which is based largely on how well our placements perform and add value.

### ▪ **Performance Guarantee :**

- ✓ Korn Ferry guarantees performance for every placed candidate for a period of twelve (12) months from his/her start date.
- ✓ If a candidate is released by the client company for performance-related issues during the first twelve (12) months of his/her employment, Korn Ferry will conduct a new search to replace the candidate for no additional retainer (charging only for expenses as incurred), provided our professional fees and expenses for the initial search were paid as agreed and there is no material change to the original position specification.
- ✓ This guarantee excludes candidates who leave for reasons other than job performance, such as a change in ownership, organizational realignment and restructuring. The guarantee is valid for eight (8) weeks upon the Client's written notification of the candidate's departure.

### ▪ **Professional Referencing and Legal and Financial Referencing:**

- ✓ Korn Ferry conducts degree verifications for all candidates presented.
- ✓ We also conduct direct professional references (360-degree references provided by candidate and third-party references as available) for all short-listed/final candidates.
- ✓ As noted earlier, Korn Ferry uses the services of a third-party firm specialized in conducting legal and financial background checks for the finalist candidate(s).
- ✓ In most cases these background checks are performed by AccuSourceHR, Inc. More recently, a Newport Beach firm, Joyce Investigative Services (JIS), has also been brought to our attention as an alternative service provider. AccuSourceHR's fees are typically in the range of \$250 to \$2000 per candidate depending on the extent of the services requested and the number of locations in which the candidate(s) has/have been active. Pricing for JIS can be provided if there is interest at the appropriate time in the process.
- ✓ Please note that Korn Ferry cannot guarantee the accuracy or content of the background check completed by a third-party provider and is not responsible for any errors or omissions in the background check results or process.

### ▪ **Consult with NCPA General Counsel for GM Employment Contract:**

- ✓ Korn Ferry is not able to provide legal advice regarding employment contract terms. We will provide details on the candidates requested terms of employment, including their stated compensation requirements within the guideline of the compensation guidelines for this role and within the parameters of appropriate CA pay equity laws.

# DEVELOPING & ASSESSING CANDIDATES:

*Finding candidates is the core of the search. We develop a search strategy to guide the search. From there, we want to find candidates that align with the External Benchmarking and will be successful candidates in the process.*



## Our Existing Network

- Our team has completed extensive work in and around the public and private energy utility sector. We know executives that we can identify immediately to see if they will confidentially engage in this assignment.

## Internal and External Market Collaborators

- Beyond the candidates we as a team know, we will leverage our Korn Ferry network including our database and our colleagues that do work in relevant sectors (industry and geography) .
- We have a deep network beyond interested candidates to include industry executives who we can utilize a credible sources to help direct us to the best qualified candidates.

## New Research

- The market is constantly changing, and we must always be looking for new and different ideas.
- We leverage Pitchbook, general research, LinkedIn and our market insights to find candidates we as a firm or team do not know that could be right for a search.

# INITIAL NCPA CANDIDATE SOURCING / OUTREACH STRATEGY:

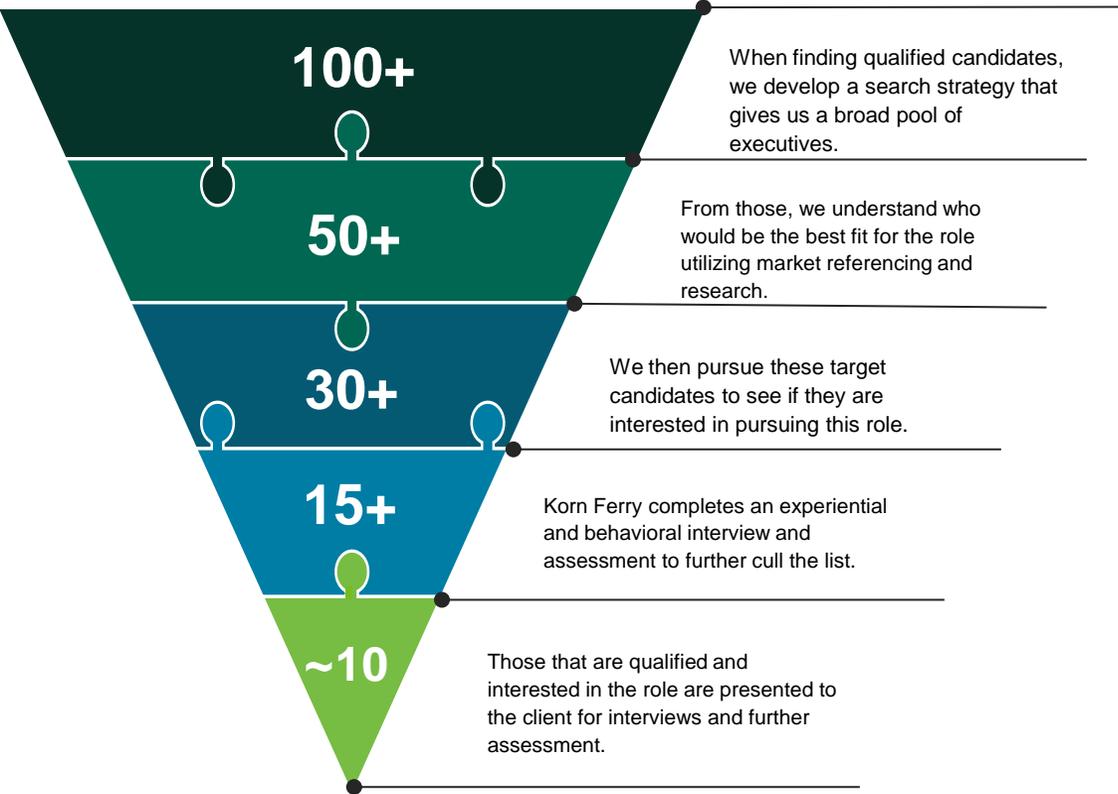
Public Power Utilities and CCAs	Utility-related Entities	Investor-owned utilities and utility related industries
<ul style="list-style-type: none"> <li>▶ Executives with highly relevant experience in similarly-situated organizations with like missions.</li> <li>▶ Examples include:                             <ul style="list-style-type: none"> <li>- APPA member utilities</li> <li>- CalCCA member utilities</li> <li>- NRECA member utilities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▶ Executives with relevant general management, legal and regulatory experience in power and infrastructure.</li> <li>▶ Examples include:                             <ul style="list-style-type: none"> <li>- RTOs</li> <li>- State and Regional Agencies (Northwest Energy Efficiency Alliance, Southwest Energy Efficiency Project, NYSERDA, Energy Northwest, EEI, EPRI, IDA, ICNU, LPPC)</li> <li>- Federal Agencies (WAPA, Bonneville Power, TVA, DOE, EPA, FERC, etc.)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▶ Investor-owned company utilities; IPPs, with relevant talent pools.</li> <li>▶ Examples include:                             <ul style="list-style-type: none"> <li>- PG&amp;E</li> <li>- SDG&amp;E</li> <li>- Puget Sound Energy</li> <li>- Portland General Electric</li> <li>- NV Energy</li> <li>- APS</li> <li>- Calpine</li> </ul> </li> </ul>

## Considerations

<ul style="list-style-type: none"> <li>▶ Relevant experience – understanding of the operational, regulatory/legislative and financial considerations of public utilities and infrastructure entities.</li> <li>▶ Limited candidate market – limited group of directly relevant organizations and executives with requisite leadership experience.</li> <li>▶ Significant variance in talent pool.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Relevant executives would present deep expertise with complex public sector experience.</li> <li>▶ Deep pool of talent.</li> <li>▶ More limited in the context of executives who have the depth of operational and convening skills required for this role.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Strong leadership, technical and operational experience.</li> <li>▶ Typically, higher compensation and incentive compensation.</li> <li>▶ Learning curve adjustment to corporate culture and governance on the “other side” – will need strong motivation and passion for being of service in the public domain.</li> </ul>
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\*NCPA member agencies to be discussed

# DEVELOPING & ASSESSING CANDIDATES:

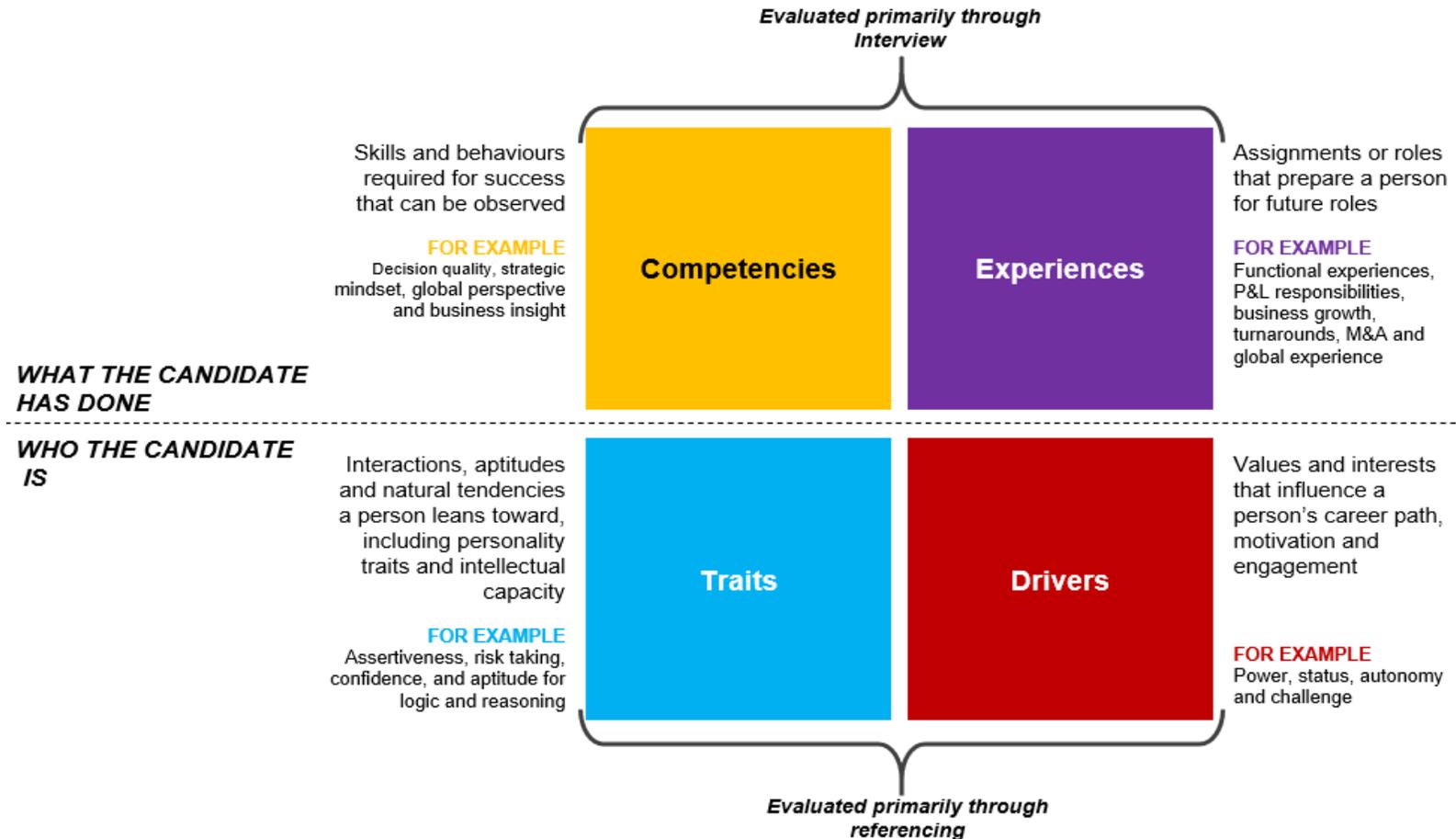


*Our initial long list is narrowed through an iterative status update and review process with the search committee.*

*The candidate universe is filtered through market intel, Korn Ferry/client interviews and industry-leading psychometrics until we identify the successful candidate.*

# KORN FERRY FOUR DIMENSIONS OF LEADERSHIP (KF4D):

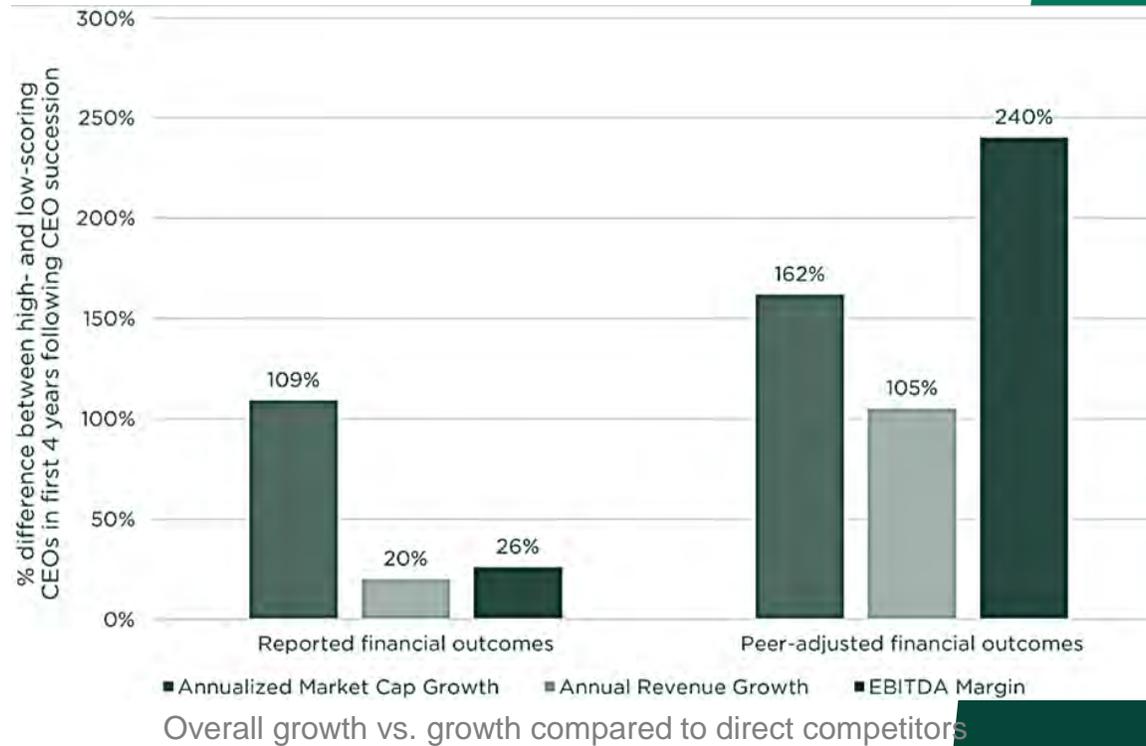
By leveraging the largest set of data on talent—more than 4 million assessments—Korn Ferry has insight into the dimensions of talent crucial for executives. The four dimensions include competencies, traits, drivers, and experiences, and by taking all four dimensions into account, it provides a holistic view of how each candidate's qualities fit the CEO role



## UNLOCKING SUCCESS FOR TOP EXECUTIVES:

Top level executives who scored high on Korn Ferry assessments create more value than those who scored low.

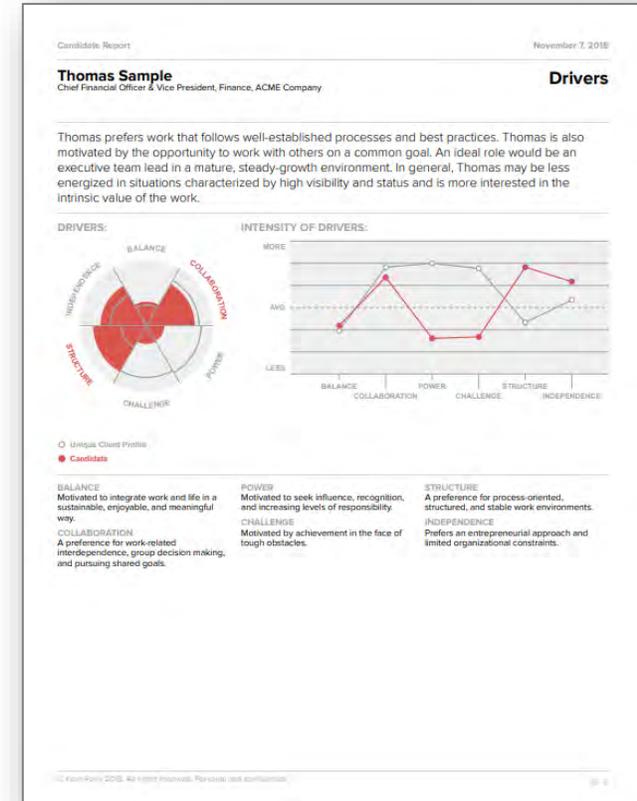
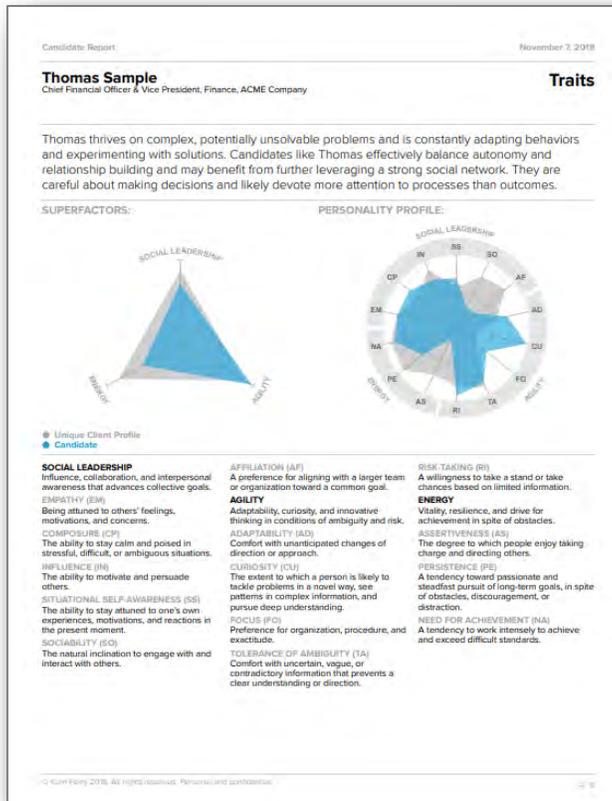
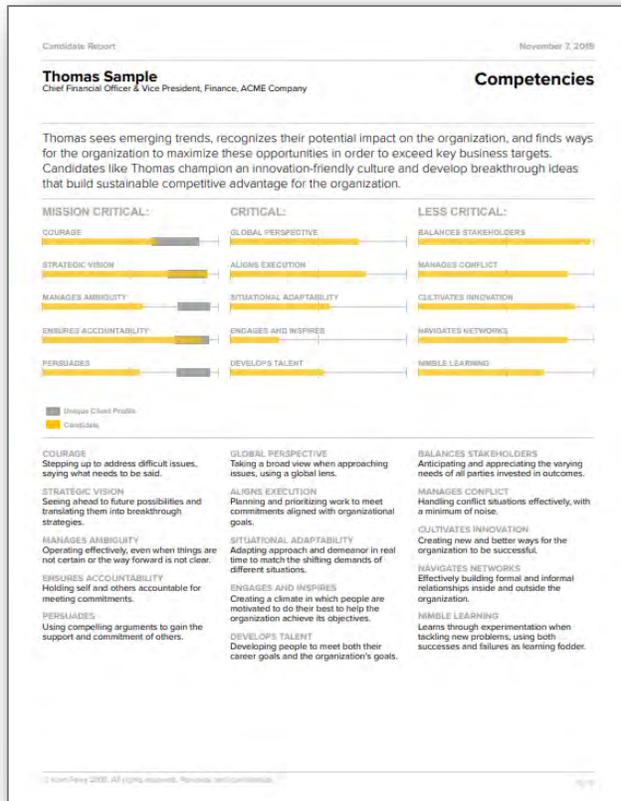
KF Assessments cut turnover by nearly 50% in the first 3 years of tenure.



~50%  
less turnover

# KF4D: COMPREHENSIVE CANDIDATE ASSESSMENT TO BETTER ASSESS FIT

Each candidate is assessed against a statistically-validated best-in-class profile that is enhanced by the unique aspects of the role as determined by each client. Korn Ferry's organizational psychologists interpret the data to uncover opportunities and areas to probe further regarding fit and capability.



*KORN FERRY'S FEES ARE NON-CONTINGENT AND CONSISTENT WITH THE STANDARDS OF THE PROFESSION. OUR GOAL IS TO ACHIEVE TOTAL CLIENT SATISFACTION. EVERY ASSIGNMENT IS TAILORED TO MEET SPECIFIC CLIENT NEEDS*

## PROFESSIONAL FEES & CONDITIONS:

Korn Ferry's standard retained executive search fee is one-third of first year cash compensation plus an administrative fee of 12%. For this assignment and in recognition of our past search relationship with NCPA, we are proposing a fully inclusive, flat fee of \$165,000 to be invoiced in four payments as follows;

- ¼ upon execution of the contractual agreement between NCPA and Korn Ferry;
- ¼ upon delivery of long list of candidates, not to exceed 45 days from the search commencement;
- ¼ upon selection of short-listed candidates, not to exceed 90 days from the search commencement;
- ¼ upon acceptance of offer by the finalist candidate.

Payment is to be made via wire transfer to Korn Ferry.

### **Related Charges:**

Korn Ferry is reimbursed for any direct, out-of-pocket expenses such as candidate and consultant travel (to be pre-approved by NCPA), and other related services including third-party provided background checking. We will set a cap on these fees of \$20,000 and we will be very judicious in our spending. Any expense over \$250 will require prior approval from NCPA. These charges will be invoiced as occurred on a monthly basis.

### **Optional Additional Assessment Fees:**

Korn Ferry can also provide highly customized additional Leadership Assessment and Transition Services that augment the KF4D assessments that are imbedded in the search process. These additional services are designed assist in the onboarding of the new GM, including “Accelerator” programs designed to further ensure success in the GM role. We are happy to provide additional information about these services in more detail if there is interest. These solutions are customized to meet the client and candidate needs and are delivered by the highly professional consultants in Korn Ferry’s Advisory organization who also have very specific experience working in the energy utility sector.



Los Angeles

Tel: +1 310-567-4501

[Shelly.Fust@kornferry.com](mailto:Shelly.Fust@kornferry.com)

## EXECUTIVE SEARCH TEAM LEAD FOR NCPA:

### SHELLY FUST:

Senior Client Partner

Utilities, Natural Resources, Renewable Energy, Infrastructure

Global Co-Lead Sustainability

Shelly is a member of Korn Ferry's Energy and Infrastructure Practices where her clients span a diverse range of sectors including energy and water/wastewater utilities (public and private), energy and water infrastructure, renewable energy development and climate technology, private equity and E&C/EPC.

She is also a co-founder and leader of Korn Ferry's global Sustainability Practice where she and her colleagues work with corporations, private equity, NFP and NGO clients worldwide to identify, recruit and develop the learning-agile leadership required to deliver robust energy decarbonization strategies and transformative climate solutions.

The unifying theme of her clients is their work to identify and integrate complex and innovative technologies, products, infrastructure, processes, systems and regulatory and legislative policies that promote Sustainability and ESG resiliency, mitigate ecosystem impact, foster innovation and facilitate access to needed capital while delivering sustainable and financial success.

She has completed executive searches for a wide range of functions including Board Director, CEO, CFO, COO, CSO and other top leadership roles in Engineering, Project Development, Finance, Customer Services, Government and Regulatory Affairs. She also helps lead CEO succession and enterprise leadership transformation initiatives in these sectors.

Shelly's prior industry experience includes roles in independent power project development, structured finance, regulatory and government affairs, water and wastewater infrastructure development. She was also responsible for standing up a comprehensive sustainability and energy sourcing program for the global CPG company, Frito-Lay.

Shelly holds a master of science degree in environmental science from the University of Texas at Dallas and a bachelor of arts degree in zoology (biology and environmental science) from Miami University, Oxford, Ohio. She was recently recognized as a Distinguished Alumni by the School of Natural Sciences and Mathematics at UTD.





New York

M: 347-585-8794

E: [peter.bogin@kornferry.com](mailto:peter.bogin@kornferry.com)

## PETER BOGIN

Senior Client Partner, Energy/Cleantech/Climatetech

Peter Bogin is a Senior Client Partner in Korn Ferry's New York office.

Having been based earlier in Paris and Dubai, Peter brings extensive knowledge and insight around international energy industry activity to Korn Ferry. He has completed several hundred senior executive and board search assignments for companies across the energy spectrum, from conventional hydrocarbon companies to VC-backed start-ups leading the energy transition to clean fuels and decarbonization.

Prior to joining Korn Ferry, Peter was a partner in another global executive search firm. Earlier in his career, he worked for Cambridge Energy Research Associates (CERA) where he authored and co-authored numerous papers on the global energy industry and was also a frequent press commentator on global energy issues and markets.

Peter began his career at the Organization for Economic Cooperation and Development (OECD) and the International Energy Agency (IEA), both in Paris.

Peter is a graduate of Dartmouth College in Hanover, New Hampshire where he earned a Bachelor's Degree in Russian Studies. He is conversant in Russian and fluent in French.



## Korn Ferry Relevant Executive Search Experience:

 <p>Chief Executive Officer</p>	 <p>Chief Executive Officer CEO, Networks</p>	 <p>WEM Board Member (2) CAISO Board Member</p>	 <p>Chief Executive Officer</p>	 <p>CEO Succession</p>	 <p>EIX Board Members (6), SVP, T&amp;D, Chief Customer Officer, Chief Nuclear Officer, Other SCE Searchers</p>
 <p>Chief Executive Officer</p>	 <p>CEO Succession</p>	 <p>CEO Succession &amp; President, Pacific</p>	 <p>Chief Executive Officer</p>	 <p>General Manager (2) Advisory engagements – CEO Accelerator; Org Strategy &amp; Design</p>	 <p>Chief Executive Officer (2)</p>
 <p>General Manager</p>	 <p>Chief Executive Officer</p>	 <p>Chief Executive Officer</p>	 <p>President, North America</p>	 <p>President</p>	 <p>Chief Executive Officer</p>
 <p>Chief Executive Officer</p>	 <p>Chief Executive Officer</p>	 <p>General Manager Chief Executive Officer</p>	 <p>Chief Executive Officer (2)</p>	 <p>Chief Executive Officer</p>	 <p>Chief Executive Officer</p>



## EXECUTIVE SEARCH REFERENCES:

Reference	Company/ Title/ Contact info	Korn Ferry Experience
<b>Janisse Quiñones</b> <a href="mailto:Janisse.quinones@ladwp.com">Janisse.quinones@ladwp.com</a>	<b>Los Angeles Department of Water &amp; Power</b> Chief Executive Officer & Chief Engineer Mobile: (858) 805-5596	KF placement in 2024; Search Committee led by Mayor Karen Bass and Nicole Neeman Brady, Former Chair LADWP Board (currently MD, TPG) (Nicole (323) 404-4846 <a href="mailto:Nneemanbrady@tpg.com">Nneemanbrady@tpg.com</a> ).
<b>Elliott Mainzer</b> <a href="mailto:eemainzer@caiso.com">eemainzer@caiso.com</a>	<b>California Independent System Operator (CAISO)</b> Chief Executive Officer Mobile: (503) 754-2393	KF client for multiple KF searches (including Board of Governors; Head of Corporate Communications and Public Relations; VP Systems Operations) and Advisory Organization Design and Leadership Assessment engagements
<b>Paul Lau</b> <a href="mailto:Paul.Lau@smud.org">Paul.Lau@smud.org</a>	<b>Sacramento Municipal Utility District (SMUD)</b> Chief Executive Officer Mobile: (916) 296-7496	KF placement (2020) and client for multiple KF searches; KF also conducted prior GM search in '14 that placed Arlen Orchard as GM
<b>Randy Howard</b> <a href="mailto:randy.howard@ncpa.com">randy.howard@ncpa.com</a>	<b>NCPA</b> General Manager Phone: (916) 878-0854	KF placement at NCPA and KF client in his role as member of WEM Nominating Committee Member('23, '24) (and Nominating Committee Chair ('25) for WEM Governing Body Member searches conducted by Korn Ferry
<b>Debra Smith</b> <a href="mailto:sddebrasmith@gmail.com">sddebrasmith@gmail.com</a>	<b>Seattle City Light</b> Former Chief Executive Officer <b>WEM</b> Governing Body Member Mobile: (541) 517-2805	KF placement at SCL in in 2018 and at WEM in 2025

# BUSINESS CASE SUMMARY:

## Brand Reputation

- Independent studies indicate that Korn Ferry is the best-known search and talent firm in the world. Our reputation for ethics, discretion, confidentiality and honesty opens doors that are closed to less regarded and less well-known firms.
- We have a track record of working successfully with NCPA in the placement of your current GM, Randy Howard. While we recognize that the diverse market knowledge and leadership skill set that Randy brings to this role is significant, we are confident in our ability to conduct another successful search for this organization.

## Process Excellence

- Korn Ferry has the ability to attract diverse traditional and non-traditional talent. For this search we would expect to recruit primarily out of the public energy sector, as well as other private energy utility and infrastructure organizations of similar scale and complexity as long as these candidates possess the unique blend of required industry experience coupled with the personal passion and commitment to being of service in the public utility sector.
- We are committed to leading an objective, confidential and transparent search process. We also have experience working with appointed and elected Boards and understand that each organization has its own unique requirements for conducting a recruitment process of this type.

## Local Team with The Reach of a Global Practice

- While Korn Ferry is a global firm, we are headquartered in Los Angeles with another major office located in the Bay Area. The project lead for this engagement, Shelly Fust, is based in LA and will be readily and economically available to meet in person as needed for this engagement.
- Peter Bogin is based in New York and will help to provide national coverage for this search. He also has immediate family in Northern California. We will also leverage Korn Ferry's local and national talent and resources, as needed, to support the search.

## Proven Data-Driven Candidate Assessment Tools

- Beyond our deep research capabilities, database and other resources, we use Korn Ferry's proprietary candidate assessment tools. This intellectual property is statistically proven to generate better results in identifying, evaluating and retaining the ideal candidate for a specific position.
- Where many assessments are either invalid altogether or based solely on skills or experience data – KF4D is the only one to offer a multi-dimensional validated assessment, built on the proven performance of over 4 million top global professionals.

**We thank you for your consideration of our credentials and would welcome the opportunity to work together on this critical GM leadership search for NCPA.**

# KORN FERRY REQUESTED LEGAL EXCEPTIONS TO “APPENDIX A” CONSULTING SERVICES AGREEMENT BETWEEN THE NORTHERN CALIFORNIA POWER AGENCY AND [CONTRACTOR]:

Section	Exception
2.2	Request deletion of the following: "satisfactorily performed". KF's fees are earned once invoiced and, per KF financial leadership, KF cannot agree to make payment contingent on "satisfactory performance" given the nature of search services.
3	For search services, the client, not KF is responsible for all applicable taxes, excluding taxes imposed on KF's net income. If NCPA is exempt from applicable taxes, NCPA must inform KF of its exemption and provide KF with supporting documentation.
2.6	KF cannot agree to liquidated damages as a matter of corporate policy.
4	KF has a set insurance program that cannot be changed on a contract by contract basis. Therefore, KF requires the following modifications: (i) remove all deductible requirements; (ii) remove "owned" vehicles from Section 4.2.2; (iii) KF will endeavor to provide the required notices in Section 4.4.2; and (iv) deletion of Section 4.4.3.  Korn Ferry’s financial leadership requires that any indemnification obligations accurately reflect the services provided and risk associated with those services. Therefore, indemnification should be as follows: "Consultant will indemnify and defend Agency and its affiliates, from and against all third party suits, claims, and all related liabilities and costs that are or are alleged to arise from: (a) Consultant’s gross negligence, willful misconduct, or fraud in the performance of the Agreement; (b) Consultant’s breach of this Agreement; or (c) intellectual property infringement.
5.2	To the fullest extent permitted by law, Agency will indemnify and defend Consultant and its affiliates from and against all third party suits, claims, and all related liabilities and costs that are or are alleged to arise from: (a) Agency’s decision to take any employment action with regard to any individual identified, evaluated, or assessed by Consultant; and (b) Agency’s breach of this Agreement."
8.1	KF's auditors require that KF have a termination for convenience option. Further KF requests clarification that, in the event the agreement is terminated by either party, KF will be entitled to receive payment of all fees and expenses that were eligible to be invoiced up to the effective date of termination.
8.4.4	KF requests this section be deleted. KF cannot agree to payment of costs to complete services as a remedy for breach.
9.1	For search services, KF is not creating "work product" for Agency. KF requests this section be deleted and replaced with the following: "Consultant grants Agency a limited license to use any candidate reports provided solely for Agency's internal use."
9.4.4	KF requests "Upon conclusion or termination of the Agreement" be replaced with "Upon receiving a written request from Disclosing Party". KF does not have systems in place to automatically return/destroy confidential information and will require a request in order to do so.



## KORN FERRY EXCEPTIONS TO “APPENDIX A” CONSULTING SERVICES AGREEMENT BETWEEN THE NORTHERN CALIFORNIA POWER AGENCY AND [CONTRACTOR] (CONT’D):

### Additional Required Terms:

KF financial leadership requires a limitation of liability be included in all search agreements. Therefore, KF requests the following terms be included: "Neither party will be liable for any indirect, special, exemplary, consequential, punitive or incidental damages of any type, including lost profits or business interruption. Consultant's aggregate liability for any damages, losses, costs and expenses arising out of this Agreement will not exceed in the aggregate the total amount of the professional fees paid to Korn Ferry pursuant to this Agreement."

KF requires the following terms be included in all contracts, for its compliance program: "Each party represents and warrants that it: (i) will comply with all applicable legal and regulatory requirements of any governmental or supranational body with jurisdiction over this Agreement or either party, which include: (a) information privacy and data protection laws and regulations relating to the protection, disclosure and use of individuals' personal data including the General Data Protection Regulation (GDPR) and other laws and regulations that mandate the protection of personal data; and (b) anti-bribery, anti-corruption, and anti-money laundering laws or regulations; and (c) international trade laws and regulations (e.g., economic sanctions (“Sanctions”) including those of the US, EU, UK and UN; (ii) is not a target of Sanctions; (iii) is not located or organized in a jurisdiction that is a target of comprehensive Sanctions (including Cuba, Iran, North Korea, Syria, and the regions of Ukraine occupied by Russia) (“Sanctioned Jurisdiction”); and (iv) is not owned or controlled directly or indirectly by any person or entity that is a target of Sanctions or located or organized in a Sanctioned Jurisdiction. Agency further represents and warrants that it will not transfer, provide access, receive, or use the Services or work product (including tools and intellectual property): to or for the benefit of any person or entity that is a target of, or owned or controlled directly or indirectly by a target of, Sanctions; to, in, or for the benefit of, any person or entity in, ordinarily resident in, or organized under the laws of, Russia or any Sanctioned Jurisdiction, unless authorized by Consultant; or to or for the benefit of any other party, if such transfer, access, or use would constitute a violation of Sanctions.

Any breach of this Section, including if Agency becomes subject to Sanctions, is a material breach of this Agreement and grounds for immediate termination by the non-breaching party."

### REQUESTED EXCEPTIONS TO INDEMNIFICATION LANGUAGE IN RFP [SECTION XIV]:

Consulting firm shall indemnify, defend with counsel reasonably acceptable to the Agency, and hold harmless the Agency, and its officials, commissioners, officers, employees, agents and volunteers from and against all **third-party** losses, liabilities, claims, demands, suits, actions, damages, expenses, penalties, fines, costs (including without limitation costs and fees of litigation), judgments and causes of action of every nature arising out of or in connection with **this RFP to the extent attributable to** any **negligent** acts or omissions by Consulting firm, its officers, officials, agents, and employees, except as caused by the ~~sole or gross~~ negligence of Agency. Notwithstanding, should this Agreement be construed as a construction agreement under Civil Code section 2783, then the exception referenced above shall also be for the active negligence of the Agency.

# WORKER'S COMPENSATION CERTIFICATE OF LIABILITY INSURANCE

**ACORD** CERTIFICATE OF LIABILITY INSURANCE DATE (MM/DD/YYYY) 07/01/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

**PRODUCER:** Marsh Risk & Insurance Services  
CA License #0437153  
533 W. 5th Street, Suite 1200  
Los Angeles, CA 90071  
Attn: Los Angeles CTRRequests@Marsh.com | P:212-948-0835  
CN103004981-DED-GALVNY-25-26

**CONTACT NAME:** \_\_\_\_\_  
**PHONE (A/C, No. Ext.):** \_\_\_\_\_ **FAX (A/C, No.):** \_\_\_\_\_  
**EMAIL ADDRESS:** \_\_\_\_\_

**INSURER(S) AFFORDING COVERAGE:**

INSURER #	INSURER NAME	NAIC #
INSURER A	Federal Insurance Company	20281
INSURER B	National Union Fire Ins. Co. of Pittsburgh, PA	19445
INSURER C	AIG Insurance Co.	19399
INSURER D	AIG Specialty Insurance Company	26883
INSURER E		
INSURER F		

**INSURED:** Korn Ferry (US)  
Korn Ferry  
1900 Avenue of the Stars, Suite 1225  
Los Angeles, CA 90067

**COVERAGES:** CERTIFICATE NUMBER: LOS-02269835-31 REVISION NUMBER: \_\_\_\_\_

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

LINE	TYPE OF INSURANCE	ACCIDENT	POLICY NUMBER	POLICY EFF. DATE (MM/DD/YYYY)	POLICY EXP. DATE (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIED PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROTECT <input checked="" type="checkbox"/> LOC <input type="checkbox"/> OTHER: _____		35894292	04/01/2025	04/01/2026	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Per occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPIOP AGG \$ 2,000,000 Combined Total Agg \$ 10,000,000
A	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY		73856722	04/01/2025	04/01/2026	COMBINED SINGLE LIMIT (Per accident) \$ 1,000,000 BODILY INJURY (Per person) \$ _____ BODILY INJURY (Per accident) \$ _____ PROPERTY DAMAGE (Per accident) \$ _____ Hired Comp/Col Ded: \$ 1,000
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED: _____ RETENTION \$ _____		79868645	04/01/2025	04/01/2026	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000
B	WORKERS COMPENSATION AND EMPLOYERS LIABILITY		WC0226983702 (AOS)	03/01/2025	03/01/2026	<input checked="" type="checkbox"/> STATUTE <input type="checkbox"/> OTHER
C	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/EMBER/ELIGIBLE (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N / A	WC0226983703 (CA)	03/01/2025	03/01/2026	E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	Professional Indemnity		01-460-50-61	05/01/2025	05/31/2026	Per Claim 5,000,000 Aggregate 5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER:** Korn Ferry (US)  
Korn Ferry  
1900 Avenue of the Stars, Suite 1225  
Los Angeles, CA 90067

**CANCELLATION:** SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE  
*Marsh Risk & Insurance Services*

ACORD 25 (2016/03)

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**ACORD** ADDITIONAL REMARKS SCHEDULE AGENCY CUSTOMER ID: CN103004981 LOC #: Los Angeles Page 2 of 2

**AGENCY:** Marsh Risk & Insurance Services

**NAMED INSURED:** Korn Ferry (US)  
Korn Ferry  
1900 Avenue of the Stars, Suite 1225  
Los Angeles, CA 90067

**POLICY NUMBER:** \_\_\_\_\_

**CARRIER:** \_\_\_\_\_ **NAIC CODE:** \_\_\_\_\_

**EFFECTIVE DATE:** \_\_\_\_\_

**ADDITIONAL REMARKS:**

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM. FORM NUMBER: 25 FORM TITLE: Certificate of Liability Insurance

The Professional Indemnity policy evidenced above is subject to self-insured retentions for various perils covered.

Cyber Liability

Carrier: AIG Specialty Insurance Company  
Policy No.: 01-436-46-71  
Effective Date: 05/31/2025  
Expiration Date: 05/31/2026

Limits: \$5,000,000

Coinv - Policy #FD654196508, Carrier: Zurich American Insurance Company, Eff./Exp. Date: 05/15/2025 - 05/15/2026, Limit: 5,000,000

ACORD 101 (2008/01)

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## PROPOSER AUTHORIZATION:

### PROPOSER:

**Company:** Korn Ferry

**Address:** 1900 Avenue of the Stars, Suite 1225, Los Angeles, CA

**Signed:** 

**Title:** Senior Client Partner

**Print Name:** Shelly Fust

**Telephone:** (310) 567-4501

**E-mail:** [shelly.fust@kornferry.com](mailto:shelly.fust@kornferry.com) Date: September 16, 2025



Korn Ferry is a global organizational consulting firm. We work with our clients to design optimal organizational structures, roles, and responsibilities. We help them hire the right people and advise them on how to reward and motivate their workforce while developing professionals as they navigate and advance their careers.

**Business advisors.**  
**Career makers.**

CALIFORNIA  
TEXAS  
COLORADO  
OHIO



## PROPOSAL

# Northern California Power Agency

Executive Recruitment Services

**Due: September 18, 2025**

**5:00 P.M. PT**

Submitted by:

**Melissa Asher**

Chief of Client Services

CPS HR Consulting, 2450 Del Paso Road, Suite 220, Sacramento, CA 95834

P: (916) 471-3358, [masher@cpshr.us](mailto:masher@cpshr.us)

Tax ID: 68-0067209

[www.cpshr.us](http://www.cpshr.us)

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## A. Executive Summary

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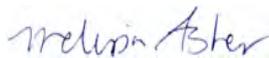
CPS HR Consulting (CPS HR) is pleased to have the opportunity to submit a proposal to assist the Northern California Power Agency (NCPA) with the recruitment of a new General Manager. We are uniquely qualified to undertake this effort as we have vast experience in assisting public agencies with executive search, screening, and placement. We have 40 years of experience providing human resources services to state and local government agencies and non-profit organizations, and over 20 years of experience placing top executives in public agencies throughout the United States.

We understand that each agency is unique, and our extensive experience allows us to tailor our process to specifically meet your needs. Our work with local government agencies throughout the United States gives us an in-depth understanding of government operations, programs, and services. CPS HR offers a broad spectrum of human resource services while delivering personalized, results-oriented services, utilizing best practice methods of recruitment and selection strategies from our team of recruitment experts. Each recruitment is an opportunity to shape and prepare your organization for the future. We understand how important this transition is for you and are perfectly placed to assist you in this endeavor. Once this project begins, we will work with NCPA to tailor our process to highlight this exciting opportunity and attract the best possible candidates.

It is our commitment to work in partnership with your organization to a successful result. Thank you for the opportunity to be considered for this assignment.

ORGANIZATION IDENTIFICATION INFORMATION	
Legal Name and DBA	Cooperative Personnel Services dba CPS HR Consulting
Contact Information	Melissa Asher, Chief of Client Services 916-471-3358, masher@cpsshr.us
Main/Project Office	2450 Del Paso Road, Suite 220, Sacramento, CA 95834; WEB: <a href="http://www.cpsshr.us">www.cpsshr.us</a>
Regional Offices	20211 Guadalupe Street, Suite 260, Austin, TX 78705 7350 E Progress Pl., Greenwood Village, CO 80111 1968 S. Coast Hwy #961, Laguna Beach, CA 92651 2014 Champions Gateway, 3rd Floor, Canton, OH 44708
Type of Business	Joint Powers Authority (Public Agency)

Sincerely,



Melissa Asher  
Chief of Client Services

## B. Proposer's Qualifications

---

### About CPS HR Consulting

CPS HR is a client-focused human resources and management consulting firm, dedicated to addressing the unique challenges faced by government and non-profit organizations. Founded in 1985, we have earned a reputation as a trusted advisor by leveraging our in-depth public sector expertise to deliver practical, results-driven solutions. As a Joint Powers Authority, we are a self-supporting government agency exclusively serving public entities. This gives us a distinct advantage in understanding and meeting the specific needs of clients across all levels of government, including Federal, State, Local, Special Districts, Higher Education and Non-Profit organizations.

Our unwavering commitment to delivering an unparalleled client experience is built on our comprehensive knowledge of the complexities within the public and non-profit sectors. We assist organizations in attracting, hiring, retaining, and motivating top talent, essential for driving organizational excellence in alignment with their vision.

With more than 100 full-time employees and a network of 200+ project consultants and technical experts across the nation, CPS HR has partnered with more than 2,700 public and non-profit clients throughout the United States. Headquartered in Sacramento, CA, with regional offices in Texas, Colorado, Ohio, and Southern California, we are strategically positioned to support your organization's growth and help your employees fulfill the promise of public service.

### Client Focused

We help clients succeed by:

- **Understanding Their Goals:** We listen to your needs, understand your business, and focus on achieving your desired outcomes.
- **Unlocking New Perspectives:** Together we explore new ideas, expand possibilities, and consider the broader impact on those you serve.
- **Bringing Solutions to Life:** We put plans into action, making strategies operational and effective.
- **Empowering Their Growth:** Provide you with the tools and knowledge to elevate performance and expand capabilities for your organization and those you serve.

### Recruitment Experts

CPS HR specializes in the recruitment and selection of key professionals for cities, counties, special districts, and non-profits. Working in partnership with the governing body or selection team, we develop customized search strategies that focus on locating and recruiting qualified candidates who match the agency's unique needs.

Our wealth of recruitment experience has been gained through *more than 20 years* of placing top and mid-level executives in public agencies throughout the United States.

- **Unmatched Recruitment Experience for Government Agencies.** CPS HR has extensive experience in recruiting executive-level professionals for public agencies across the United States. As a public agency ourselves, we understand how to work with and within government. Our understanding of public sector culture and policy uniquely sets us apart from our competitors.
- **Focus on Diversity Recruiting.** In the past three years, 57% of the candidates placed by CPS HR were female, members of ethnic minorities or both. To continue this trend, CPS HR is constantly assessing the best methods for reaching the broadest network of possible candidates. To that end, we have just signed a contract with Zoom Info, a new sourcing platform, that includes a diversity sourcing filter.
- **Seasoned Executive Recruiters.** Our recruiters possess a high level of expertise in recruiting and placing executive-level professionals. Our staff of experts includes an exceptional group of full-time employees as well as a full complement of subject matter experts, intermittent employees, and part-time employees with a variety of public and private sector experience.
- **Detailed Needs Assessments.** We conduct a detailed needs assessment to identify 1) future organizational direction; 2) challenges facing the position; 3) the working style and organizational climate; and 4) required core and job specific competencies as well as personal and professional characteristics.
- **Success Recruiting Non-Job Seeking Talent.** We recognize that the very best candidates for some types of positions may not be looking for a career change, therefore, our recruitment team takes a very aggressive approach to identify and recruit such candidates.
- **Vast Pool of Public Agency Contacts.** CPS HR maintains a database of candidates and an extensive network of external resources to leverage for executive-level positions. We utilize our vast pool of public and non-profit contacts to deliver a strong list of competitive candidates who will be well prepared to assist you in the accomplishment of your specific mission and goals.
- **Satisfied Clients.** *Our executive search client satisfaction rating averages 4.6 on a scale of 5.* While many companies talk about client satisfaction, how many measure the impact of that through assessing client satisfaction by distributing written surveys and tying the results of these surveys to their performance management system? CPS HR Consulting does. A client satisfaction survey is sent at the end of every engagement requesting feedback on the quality of our staff, deliverables, and the overall consulting relationship.
- **Retention/Success Rate.** Our success rate is tied to the longevity of the candidates we place, currently more than 95% of our placements are still in their position after two years.

## C. Required Information

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### Individual Qualifications

CPS HR has assembled a strong project team with each member possessing extensive recruiting experience and a direct, in-depth understanding of local government. Our executive recruitment team will work collectively to fulfill NCPA's needs in a timely and effective manner. We are committed to providing each of our clients the same level of service excellence, and we take great care not to take on more work than this commitment allows. We will not utilize subcontractors for these services. No staff members will be removed or replaced without the prior written concurrence of NCPA.

### Team Resumes

#### **Pamela H. Derby, Manager, Executive Recruitment**

Since joining CPS HR Consulting in 2003, Pam Derby has conducted a wide range of recruitments for county, city, special district and association executives including city attorney, executive director, general manager, city manager, assistant and deputy city manager, police chief, community and economic development director, human resource director, finance director, city administrator, registrar of voters, library director, and director of information technology in addition to specialized support positions.

Prior to joining CPS HR, Ms. Derby served as the Aide to the Yuba County Board of Supervisors serving as the Board's liaison to County Department Heads, the community, and the media. This experience provided her with a unique perspective into the special circumstances that exist in a Board/Council-Manager relationship and a keen awareness of the inner workings of local government.

She is sensitive to balance the wants of the community with the needs of the client so as to tailor a recruitment process that reaches out to the most appropriate candidates and ensures a diverse group of individuals from which to make a selection. She has successfully employed these techniques in jurisdictions ranging from under 10,000 to 10 million. Moreover, she employs a firmly-held personal philosophy that candidates must be treated with the same respect and careful consideration as her client.

Prior to her local government service, Ms. Derby served in the private sector and with several non-profit lobbying associations. She was responsible for the management of several large consumer groups.

#### **Employment History**

- Senior Executive Recruiter, CPS HR Consulting
- Professional Management Consultant, CPS HR Consulting
- Administrative Technician, CPS HR Consulting

- Aide to the Board of Supervisors, Yuba County, CA
- Special Cases Manager, Consumer Relations, The Money Store, CA
- Supervisor, Trailing Documents, The Money Store, CA

### **Fatima Nukic, Associate Executive Recruiter**

Fatima Nukic has over ten years of professional experience in the public sector. She has assisted in a wide range of recruitments for county, city, special district, and association executives including recruitments for the positions of: executive director, city attorney, police chief, human resources director, finance director, health and human services director, risk manager, environmental resources director. Ms. Nukic is an action-oriented and results-driven leader who thrives on finding new ways to promote recruitments and finding ideal candidates. She brings an extensive background in promoting, sourcing, and social media marketing to her role as an Associate Executive Recruiter at CPS HR Consulting.

#### **Employment History**

- Associate Executive Recruiter, CPS HR Consulting
- Executive Search Technician, CPS HR Consulting
- Office Manager/HR, DMD Express
- Guest Representative, The Mirage Hotel and Casino
- Department Manager, Albertsons

#### **Professional Experience**

- Various administrative duties, such as research, scheduling appointments, handling client/candidate questions, filing, data entry, answering telephones, and operating various office equipment. Process contracts and coordinate client invoices.
- Proofread, edit, copy, assemble, and mail documents and reports. Communicate with clients and candidates - this typically involves answering questions, providing information, resolving issues, and writing letters and e-mails.
- Process, code, and review expense claims, candidate fees/refunds, invoices and other payments. Enter information into applicant tracking system, and other assignments as needed.

#### **Education**

- Project Management Certificate-CSUS College of Continuing Education
- Bachelor of Science in Business Administration-University of Nevada, Las Vegas
- Bachelor of Arts, German Studies-University of Nevada, Las Vegas

## Similar Recruitments

Below is a list of recent executive recruitments to showcase our experience in leading searches of similar scope.

Agency	Title	Year Completed
Tahoe-Truckee Sanitation Agency, CA	General Manager	2025
Town of Discovery Bay Community Services District, CA	Assistant General Manager	2025
Southwest Ohio Regional Transit Authority, OH	Chief Executive Officer / General Manager	2025
Goleta West Sanitary District, CA	General Manager	2025
My Sister's House, CA	Chief Executive Officer	2025
El Dorado Irrigation District, CA	General Manager	2025
Stege Sanitary District, CA	District Manager	2024
Ojai Valley Sanitary District, CA	General Manager	2024
Santa Lucia Community Services District, CA	General Manager	2024
South Placer Municipal Utility District, CA	General Manager	2024
Ironhouse Sanitary District, CA	General Manager	2024
City of San Jose, CA	Regional Wastewater Facility General Manager	2024
Harlingen Waterworks Systems, TX	Assistant General Manager	2024
City and County of San Francisco, CA	Assistant General Manager, Wastewater Enterprise (Outreach)	2024
Utah Transit Authority, UT	General Manager	2024
North San Joaquin Water Conservation District, CA	General Manager	2023
Coastside County Water District, CA	Assistant General Manager	2023
Sierra Lakes County Water District, CA	General Manager	2023
Central Contra Costa Sanitary District, CA	Deputy General Manager	2023
North of the River Recreation & Park District, CA	General Manager	2023
Selma-Kingsburg-Fowler County Sanitation District, CA	General Manager	2023

Agency	Title	Year Completed
East Bay Regional Park District, CA	Assistant General Manager of Acquisition, Stewardship, and Development	2023
East Bay Regional Park District, CA	Assistant General Manager of Operations	2023
City of Grand Prairie, TX	Epic General Manager (Outreach)	2022
Indian Wells Valley Water District, CA	General Manager	2022
San Diego County Water Authority, CA	General Counsel	2022
Texas Recreation & Park Society, TX	Executive Director	2022
Mid-Peninsula Water District, CA	General Manager	2022
East Bay Regional Park District, CA	General Manager	2021
Metropolitan Transportation Commission, CA	General Counsel	2020
Alderwood Water and Wastewater District, WA	General Manager	2020
Elk Grove Water District, CA	Program Manager	2020
City of Ontario, CA	Assistant General Manager	2020
City of Redlands, CA	Director of Municipal Utilities and Engineering	2020
Carmichael Water District, CA	General Manager	2020
Hayward Area Recreation and Park District, CA	General Manager	2020

## Fee Proposal and Guarantee

Our professional fixed fee covers all CPS HR services and deliverables associated with **Phases I, II, and III** of the recruitment process. We are also providing the fees associated with **Partial (Phase I and II only) and Outreach only services**. Travel expenses for candidates who are invited forward in the interview process are not included in our flat fee price; however, an option to make those arrangements can be included in our agreement for a not-to-exceed cost of \$5,000.

Professional Fixed Fee Per Recruitment*	
Service	Pricing
Full Executive Recruitment	\$30,000 Flat Fee
Partial Executive Recruitment	\$20,000 Flat Fee
Outreach Only Services	\$10,000 Flat Fee (includes brochure and direct advertising)
<u>Optional</u> Reimbursement for Candidate Travel	NTE \$5,000

*\*Professional fees for a Partial and Full recruitment will be billed and paid at the completion of each phase. Professional fees for an Outreach/Advertising project will be billed and paid in full after the completion of the project.*

### One-Year Service Guarantee

If the employment of the candidate selected and appointed by NCPA as a result of a **full executive recruitment (Phases I, II, and III)** comes to an end before the completion of the first year of service, CPS HR will provide NCPA with professional services to appoint a replacement. Professional consulting services will be provided at no cost. NCPA would be responsible only for expenses such as re-advertising, consultant travel, additional background checks, etc. **This guarantee does not apply to situations in which the successful candidate is promoted or re-assigned within the organization during the one-year period.** Additionally, should the initial recruitment efforts not result in a successful appointment, CPS HR will extend the aggressive recruiting efforts and screen qualified candidates until an offer is made and accepted. CPS HR does not provide a guarantee for candidates placed as a result of a partial recruitment effort.

## References

Provided below is a partial list of clients we have recently worked with in providing similar executive recruitment services. We are confident that these public-sector clients will tout our responsiveness and ability to successfully place candidates that were a good fit for their organization's needs.

## Reference 1

**Agency:** South Placer Utility District, CA  
**Contact:** Emilie Costan, Administrative Services Manager  
**Phone/Email:** 916-786-8555; [ecostan@spmud.ca.gov](mailto:ecostan@spmud.ca.gov)  
**Address:** 5807 Springview Dr, Rocklin, CA 95677  
**Project:** Full Recruitment for General Manager (2024)

## Reference 2

**Agency:** El Dorado Irrigation District, CA  
**Contact:** Jose Perez, Director of Human Resources  
**Phone/Email:** 530-642-4013; [jperez@eid.org](mailto:jperez@eid.org)  
**Address:** 2890 Mosquito Road, Placerville, CA 95667  
**Projects:** Full Recruitment for General Manager (2025), Outreach Services for Sr. Civil Engineers (2025), Director of Finance (2025), Water Treatment Supervisor (2025), Communications and Media Relations Manager (2025)

## Reference 3

**Agency:** Orange County Power Authority (OCPA), CA  
**Contact:** Steven Halligan, Management Analyst  
**Phone/Email:** 949-767-8700; [shalligan@ocpower.org](mailto:shalligan@ocpower.org)  
**Address:** 5642 Sand Canyon Ave, PO Box 54283, Irvine, CA 92916  
**Projects:** Full Recruitments for Chief Executive Officer (2024), Power Resources Director (2023)

## Our Approach

### Key Stakeholder Involvement

The NCPA Executive Committee and NCPA Commission on behalf of Northern California Power Agency must be intimately involved in the search for a new General Manager. Our approach assumes their direct participation in key phases of the search process. At the discretion of the Executive Committee and Commission, other key stakeholders may also be invited to provide input for the development of the candidate profile.

### NCPA's Needs

A critical first step in a successful executive search is for the Executive Committee and Commission to define the professional and personal qualities required of the General Manager. CPS HR has developed a very effective process that will permit the Executive Committee and Commission to clarify the preferred future direction for NCPA; the specific challenges NCPA is likely to face in achieving this future direction; the working style and organizational climate the

Executive Committee and Commission wishes to establish with the General Manager; and ultimately, the qualities required of the General Manager.

### **Commitment to Communication**

Throughout the recruitment process, we are strongly committed to keeping you fully informed of our progress. We will collaborate with you to provide updates on the status of the recruitment via your preferred method of communication (phone conference, email, etc.).

We place the highest level of importance on customer service and responding in a timely manner to all client and candidate inquiries. Our previous clients and candidates have expressed a sincere appreciation for our level of service and responsiveness to the management of the recruitment process. As a result, we have many long-term relationships with clients that have led to opportunities to assist them with multiple recruitments.

CPS HR's communication continues once you have selected a candidate, and will contact the Executive Committee and Commission and the newly appointed General Manager within six months of appointment to ensure an effective transition has occurred.

### **Aggressive, Proactive, and Robust Recruitment**

We take an aggressive approach in identifying and recruiting the best available candidates. There are those candidates who would gladly rise to the professional challenge and apply for this position; however, some of the best candidates are often not actively seeking a new position and may only consider a change once we present them with your opportunity. Evoking the sense of vision and opportunity in qualified persons is among the responsibilities of CPS HR, and we pride ourselves in our efforts to reach the best available potential candidates.

We use advertisements, directly email the outreach brochure, post messages and connect with potential candidates on business media such as LinkedIn, and of course, pick up the phone and call qualified individuals and referral sources.

### **Diversity Outreach Process**

CPS HR strives to attract the most highly qualified, diverse candidate pool possible. We are pleased that our diligent efforts have resulted in more than 57% of our executive level placements being people of color and/or female candidates within the past three years.

We accomplished this by advertising with organizations like the National Forum for Black Public Administrators, the National Association of Asian American Professionals, and the Local Government Hispanic Network in order to reach these specific population groups. We also seek candidate referrals from local subject matter experts and the national leadership of groups like Women Leading Government. By taking the time to directly contact these influential industry experts, we ensure that we capture the maximum number of distinguished candidates – particularly those who are well-known in their industries, but who may not be actively looking for a new job. Our recruitment process results in an exceptionally diverse candidate pool and a high level of client satisfaction.

## Methodology and Scope of Work

Our proposed executive search process is designed to provide NCPA with the full range of services required to ensure the ultimate selection of a new General Manager is uniquely suited to NCPA's needs. *CPS HR can perform Outreach Only or Partial Recruitment services if a Full Recruitment is not needed by NCPA.*



**Phase I:** Our consultant will meet with the Executive Committee and Commission to ascertain NCPA's needs and ideal candidate attributes, to target our search efforts, and maximize candidate fit with NCPA.

**Phase II:** The recruitment process is tailored to fit NCPA's specific wants and needs, with targeted advertising, combined with contacts with qualified individuals from our extensive database.

**Phase III:** The selection process is customized for NCPA. CPS HR will work with the Executive Committee and Commission to determine the process best suited to Northern California Power Agency.

**Below is a breakdown of the services included in each recruitment option.**

Task	Description	Outreach	Partial	Full
<b>Phase I - Develop Candidate Profile and Recruitment Strategy</b>				
1	Finalize Schedule		X	X
2	Hold Key Stakeholder Meetings	X	X	X
3	Develop Candidate Profile	X	X	X
4	Develop Recruitment Brochure	X	X	X
<b>Phase II – Aggressive, Proactive, and Robust Recruitment</b>				
1	Place Ads	X	X	X
2	Identify and Contact Potential Candidates	X	X	X
3	Review Application Materials		X	X
4	Conduct Screening Interviews		X	X
5	Submit Client Report		X	X
6	Client Meeting to Select Semifinalists		X	X
7	Notify Candidates		X	X

Phase III – Selection				
1	Prepare Assessment			X
2	Schedule Candidates; Coordinate Travel			X
3	Prepare Evaluation manuals			X
4	Facilitate Finalist Selection Process			X
5	Conduct Reference and Background Checks			X
6	Assist in Negotiation (if requested)			X

## Phase I - Develop Candidate Profile and Recruitment Strategy

Task 1 - Review and Finalize Executive Search Process and Schedule

Task 2 - Key Stakeholder Meetings

Task 3 - Candidate Profile and Recruitment Strategy Development

Task 4 - Develop Recruitment Brochure

The first step in this engagement is a thorough review of NCPA’s needs, culture and goals; the executive search process; and the schedule. CPS HR is prepared to meet with key stakeholders to obtain input in developing the ideal candidate profile and to assist us in understanding key issues and challenges that will face a new General Manager. Activities will include:

- Identifying key priorities for the new General Manager and the conditions and challenges likely to be encountered in achieving these priorities.
- Describing the type of working relationship the Executive Committee and Commission wishes to establish with the General Manager.
- Generating lists of specific competencies, experiences, and personal attributes needed by the new General Manager in light of the discussions above.
- Discussing recruitment and selection strategies for the Executive Committee and Commission’s consideration to best produce the intended results.

CPS HR will provide a summary to NCPA stemming from these activities as an additional source of information for developing the candidate profile and selection criteria.

Following the completion of the workshop session, CPS HR will work with a professional graphic artist to design a recruitment brochure and present it to NCPA for review. Brochure examples are available on our website at <https://www.cpsr.us/executive-level-recruitment-job-listings/>

## Phase II - Aggressive, Proactive, and Robust Recruitment

### Task 1 - Place Advertisements

### Task 2 - Identify and Contact Potential Candidates

### Task 3 - Resume Review and Screening Interviews

### Task 4 - Executive Committee and Commission Selects Finalists

The recruitment process is tailored to fit NCPA's specific wants and needs, with targeted advertising, combined with personal contacts with qualified individuals from our extensive database.

CPS HR will prepare, submit for your approval, and publish advertisements on professional and affiliate websites to attract candidates on a nationwide, regional, local or targeted basis based on the recruitment strategy.

As a consulting firm that interacts with hundreds of public sector executives during engagements, we have a cadre of individuals who we inform of recruitments, both to increase the visibility of the opening and to attract appropriate individuals who fit the special needs of our client. Communication with these professionals ensures that an accurate picture of the requirements of the job is apparent and proliferated throughout their professional networks.

**CPS HR is focused on reaching a diverse candidate pool** and would recommend publications/websites that are targeted to minority and female candidates. In addition to placing ads on websites aimed at minority candidates, we will contact leaders within appropriate associations to gain their insight and referrals of possible candidates.

***Within the past three years, more than 57% of our executive level placements have been minority and/or female candidates.***

CPS HR will prepare an email distribution list containing prospective candidates and referral sources. These individuals will receive a link to the General Manager brochure along with a personal invitation to contact CPS HR should they have any questions about the position.

CPS HR maintains a comprehensive, up-to-date database of industry leaders and experienced professionals; however, we do not rely solely upon our current database. We also conduct research to target individuals relevant to your specific needs and expectations to ensure that we are thorough in our efforts to market this position to the appropriate audience and to garner a diverse and quality pool of candidates.

We will:

- Convey a strong sense of the purpose and strategy of NCPA. For many talented individuals, understanding these aspects is one of the key motivators to compete in such an environment.

- Provide guidance and resources to candidates regarding the area's cost of living, mean and median housing prices, higher education opportunities, K-12 education information, and other aspects of interest to those who are considering relocating to the area.
- Actively seek highly qualified candidates who may be attracted by the prospect of collaboration with other departments, providing exceptional leadership to NCPA or continuing to ensure the public confidence in the integrity of NCPA.

CPS HR will directly receive and initially screen all resumes. This screening process is specifically designed to assess the personal and professional attributes NCPA is seeking and will include a thorough review of each candidate's resume, and if applicable, supplemental questionnaire responses and other supporting materials. CPS HR will personally speak to selected candidates during a preliminary screening interview and will spend extensive time ascertaining each candidate's long-term career goals and reasons why the candidate is seeking this opportunity, as well as gaining a solid understanding of the candidate's technical competence and management philosophy. We will gather data on any other unique aspects specific to this recruitment based upon the candidate profile, as well as conduct internet research on each candidate interviewed.

CPS HR will prepare a written report that summarizes the results of the recruitment process and recommends candidates for further consideration by the Executive Committee and Commission. Typically, the report will recommend five to eight highly qualified candidates and will include resumes and a profile on each interviewee's background. CPS HR will meet with the Executive Committee and Commission to review this report and to assist them in selecting a group of finalists for further evaluation.

### Phase III - Selection

Task 1 - Design Selection Process

Task 2 - Administer Selection Process

Task 3 - Final Preparation for Appointment

Task 4 - Contract Negotiation (if requested)

CPS HR will design a draft selection process based on information gathered in Phase I. We will meet with NCPA to review this process and discuss NCPA's preferred approach in assessing the final candidates. The selection process will typically include an in-depth interview with each candidate but may also include other selection assessments such as an oral presentation, preparation of written materials, and/or problem-solving exercises.

We will coordinate all aspects of the selection process for NCPA. This includes preparing appropriate materials such as interview questions, evaluation manuals, and other assessment exercises; facilitating the interviews; assisting NCPA with deliberation of the results; and contacting both successful and unsuccessful candidates.

Following the completion of the selection process, CPS HR will be available to complete the following components:

- **Arrange Follow-up Interviews/Final Assessment Process:** Should NCPA wish to arrange follow-up interviews and/or conduct a final assessment in order to make a selection, CPS HR will coordinate this effort.
- **Conduct In-Depth Reference Checks:** The in-depth reference checks are a comprehensive 360-degree evaluation process whereby we speak with current and previous supervisors, peers, and direct reports.

(It is our policy to not contact current supervisors until a job offer is made, contingent upon that reference being successfully completed, so as not to jeopardize the candidates' current employment situation.) Candidates are requested to provide a minimum of five references. CPS HR is able to ascertain significant, detailed information from reference sources due to our commitment to each individual of confidentiality, which leads to a willingness to have an open and candid discussion and results in the best appointment for NCPA. A written (anonymous) summary of the reference checks is provided to NCPA.

- **Conduct Background Checks:** Upon a conditional job offer, we will arrange for a background check of a candidate's records on driving, criminal and civil court, credit history, education, published news, and other sensitive items. Should any negative or questionable content appear during these checks, CPS HR will have a thorough discussion with the finalist(s) and will present a full picture of the situation to NCPA for further review.
- **Contract Negotiation (if requested):** Successful negotiations are critically important, and we are available to serve as your representative in this process. With our expertise, we can advise you regarding current approaches to various components of an employment package. We can represent your interests with regards to salary, benefits, employment agreements, housing, relocation, and other aspects, with the ultimate goal of securing your chosen candidate.

## Timeline

The project team CPS HR has selected is prepared to begin work upon receipt of a fully-executed contractual agreement. All search activities up to and including the selection of a new General Manager can be completed in 14 to 16 weeks. The precise schedule will depend on the placement of advertising on appropriate professional and affiliate websites, and the ability to schedule, as quickly as possible, the initial meeting. A proposed schedule of major milestones is presented on the following page.

Task Name	Month 1				Month 2				Month 3				Month 4			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Initial Meeting/ Candidate Profile	▶															
Draft Brochure		▶														
Brochure Approved/ Printed & Place Ads			▶													
Aggressive Recruiting					▶											
Final Filing Date							▶									
Preliminary Screening									▶							
Present Leading Candidates										▶						
Semi-finalist Interviews													▶			
Reference/ Background Checks														▶		
Final Interviews															▶	
Appointment																▶
Weeks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16

## D. Acknowledgement of Agreement and Statement of Exceptions

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### Contract Notations/Variations

CPS HR's Contracts Manager has reviewed the professional services agreement information included in the RFP. We can accept the terms and conditions set forth in it with the following variations/notations of which we respectfully request and hope NCPA is amenable to discussion of this language during contract negotiations.

#### 1. Variation regarding Appendix A, Consulting Services Agreement, Section 2.1 Invoices

- Since services are proposed on a fixed fee basis, we request the following language to be removed:
  - *At Agency's option, the total number of hours of work performed under the Agreement by Consultant and each employee, agent, and subcontractor of Consultant performing services hereunder; and*
  - *At Agency's option, when the Consultant's Scope of Work identifies tasks, for each work item in each task, a copy of the applicable time entries showing the name of the person doing the work, the hours spent by each person, a brief description of the work, and each reimbursable expense, with supporting documentation, to Agency's reasonable satisfaction.*

#### 2. Notation regarding Appendix A, Consulting Services Agreement, Section 2.1 Invoices

- Since services are proposed on a fixed fee basis, we request the following language to be removed:

*Invoices will be submitted upon phase completion and will include tasks completed.*

#### 3. Notation regarding Appendix A, Consulting Services Agreement, Section 4.2.1 Commercial General Insurance:

- Our General Liability policy has a \$1,000,000 limit. We have an Umbrella policy of \$6,000,000 to cover any minimum limits.

#### 4. Notation regarding Appendix A, Consulting Services Agreement, Section 4.2.2 Automobile Liability:

- Our auto liability policy limit is \$1,000,000 and symbols 8 and 9 only. CPS HR does not own autos.

**5. Variation regarding Appendix A, Consulting Services Agreement, Exhibit B - Compensation Schedule and Hourly Fees:**

- Since the services are being proposed on a fixed fee basis, we request the following language to be removed:  
*including hourly fees and expenses, shall be\_\_\_\_, subject to Section 2 of the Agreement. The hourly rates and/or compensation break down and an estimated amount of expenses*



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

6/30/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Edgewood Partners Ins. Center 10877 White Rock Road Suite 300 Sacramento - P&C Lic #0B29370 Rancho Cordova CA 95670	<b>CONTACT NAME:</b> Brianna Orchekowski	
	<b>PHONE (A/C, No. Ext):</b>	<b>FAX (A/C, No):</b>
<b>E-MAIL ADDRESS:</b> brianna.orchekowski@epicbrokers.com		
<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
<b>INSURER A :</b> Hartford Fire Insurance Company		19682
<b>INSURER B :</b> Sentinel Insurance Company, Ltd.		11000
<b>INSURER C :</b> Hartford Casualty Insurance Company		29424
<b>INSURER D :</b> Trumbull Insurance Company		27120
<b>INSURER E :</b> Lloyd's of London		85202
<b>INSURER F :</b>		

**COVERAGES** **CERTIFICATE NUMBER:** 1474087398 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Ded \$0 GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:	Y	Y	57UUNBM9LPG	7/1/2025	7/1/2026	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
D	<input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	57UENBE6965	7/1/2025	7/1/2026	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ \$10,000			57RHUBP8VA9	7/1/2025	7/1/2026	EACH OCCURRENCE \$ 6,000,000 AGGREGATE \$ 6,000,000 \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	N/A	57WEBF5WNL	7/1/2025	7/1/2026	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER Stop Gap Applies E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
E	Errors & Omissions Claims Made/Retro Date 10/13/1989			PSO0340387598	7/1/2025	7/1/2026	Each Claim/Agg Deductible/Each Claim \$3,000,000 \$50,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 Evidence of Coverage

<b>CERTIFICATE HOLDER</b>  Evidence of Coverage	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	<b>AUTHORIZED REPRESENTATIVE</b> 

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**EXHIBIT C**

**CERTIFICATION**

**Affidavit of Compliance for Contractors**

I, Melissa Asher, Chief of Client Services

(Name of person signing affidavit)(Title)

do hereby certify that background investigations to ascertain the accuracy of the identity and employment history of all employees of

CPS HR Consulting

(Company name)

for contract work at:

LODI ENERGY CENTER, 12745 N. THORNTON ROAD, LODI, CA 95242

(Project name and location)

have been conducted as required by the California Energy Commission Decision for the above-named project.



(Signature of officer or agent)

Dated this 16th day of September, 2025.

THIS AFFIDAVIT OF COMPLIANCE SHALL BE APPENDED TO THE PROJECT SECURITY PLAN AND SHALL BE RETAINED AT ALL TIMES AT THE PROJECT SITE FOR REVIEW BY THE CALIFORNIA ENERGY COMMISSION COMPLIANCE PROJECT MANAGER.

**XIV. INDEMNIFICATION**

Consulting firm shall indemnify, defend with counsel reasonably acceptable to the Agency, and hold harmless the Agency, and its officials, commissioners, officers, employees, agents and volunteers from and against all losses, liabilities, claims, demands, suits, actions, damages, expenses, penalties, fines, costs (including without limitation costs and fees of litigation), judgments and causes of action of every nature arising out of or in connection with any acts or omissions by Consulting firm, its officers, officials, agents, and employees, except as caused by the sole or gross negligence of Agency. Notwithstanding, should this Agreement be construed as a construction agreement under Civil Code section 2783, then the exception referenced above shall also be for the active negligence of the Agency.

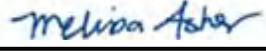
**XV. ATTACHMENTS**

- Appendix "A": Consulting Services Agreement
- Appendix "B": General Manager Job Description

**PROPOSER:**

**Company:** CPS HR Consulting

**Address:** 2450 Del Paso Rd, Ste 220, Sacramento, CA 95834

**Signed:**  **Title:** Chief of Client Services

**Print Name:** Melissa Asher **Telephone:** (916) 471-3358

**E-mail:** masher@cpsshr.us **Date:** 9/16/2025

## Proposal for Executive Recruitment Services

Submitted to: Northern California Power Agency (NCPA)

Submitted by: Elevate Consulting, LLC

## A. Executive Summary

Elevate Consulting, LLC is honored to submit this proposal to support the Northern California Power Agency (NCPA) in conducting the executive search for its next General Manager. We recognize that this is one of the most important leadership transitions in NCPA's history: the General Manager will oversee a \$565 million annual budget, manage over \$1 billion in assets, and lead an agency serving more than 700,000 Northern California residents. This role requires not only technical knowledge of the energy and utility sectors, but also visionary leadership, political acumen, and the ability to inspire confidence across NCPA's member communities.

### Our Commitment

Elevate Consulting brings over 20 years of experience in executive recruitment, human resources strategy, and leadership development across public agencies, regulated industries, and mission-driven organizations. We understand the complexity of governance-driven searches, the public accountability required by California joint powers authorities, and the urgency of ensuring a seamless transition with the new General Manager in place by early 2026.

### How We Will Deliver the Scope of Work

- Recruitment Process Design – Within the first 2 weeks, we will meet with NCPA's Executive Committee and Commission to build a detailed candidate profile, selection criteria, and outreach plan.
- Diverse Outreach & Candidate Sourcing – Weeks 3–8 will focus on national and regional outreach, including professional associations and diversity-focused networks. Passive candidates will be engaged directly through discreet outreach.
- Candidate Screening & Shortlisting – By Week 10, we will present a vetted pool of at least 10 candidates with resumes, interviews, litigation/conflict checks, and references.
- Interview & Assessment Support – Weeks 11–14 will focus on structured panel interviews, tailored assessments, and evaluation scoring rubrics. We will facilitate the process to ensure fairness and transparency.

- Background Checks & Contract Negotiations – Finalists will undergo comprehensive background checks and conflict-of-interest reviews. We will also assist with compensation benchmarking and contract negotiations.
- Transition & Onboarding – Following selection, Elevate will support the first 90 days of transition with an onboarding plan and retention strategies.

## Proposed Timeline

Phase	Activities	Timeline
Phase 1: Discovery & Profile	Kickoff, finalize profile, outreach plan	Weeks 1–2
Phase 2: Candidate Sourcing	National outreach, diversity pipelines, advertising	Weeks 3–8
Phase 3: Screening & Shortlisting	Candidate interviews, checks, shortlist of 10	Weeks 9–10
Phase 4: Selection & Interviews	Panel interviews, scoring rubrics, assessments	Weeks 11–14
Phase 5: Finalist Selection & Negotiation	Negotiations, background & compliance checks	Weeks 15–16
Phase 6: Transition & Onboarding	Retention planning, onboarding plan	Weeks 17–20

## Why Elevate Consulting

- Proven Success in Executive Placements: 92% retention beyond 3 years; 12-month guarantee.
- California-Aligned Expertise: Deep public-sector recruitment experience.
- Diversity-Driven Approach: Inclusive candidate pools reflecting equity and inclusion.
- Technology & Transparency: Candidate portal and scoring tools.
- Risk Mitigation: Free re-search if placement departs within 12 months.

## B. Proposer’s Qualifications

Elevate Consulting brings over two decades of expertise in executive recruitment, HR leadership, and organizational strategy. Our qualifications align with NCPA’s requirements for experience, method, and depth of capabilities.

- Utility & Public Sector Alignment
- California-Focused Knowledge
- Executive Onboarding Success

**C. Required Information**

1. Individual Qualifications

Team Member	Qualifications & Experience
Annie Pelissier – Principal Consultant & Lead Recruiter	20+ years HR, executive recruitment, leadership development.
Senior HR Consultant	15+ years public sector HR, SHRM-SCP certified.
Recruitment Research Associate	Specialist in diverse talent sourcing and outreach.
Background & Compliance Specialist	Litigation reviews, compliance, risk mitigation.
HR Recruitment Coordinator	Project logistics, candidate communications, scheduling.

2. Fee Proposal

Service Component	Deliverable	Fee
Recruitment Design & Candidate Profile	Consultation, outreach plan	\$12,500
Candidate Outreach & Sourcing	National & regional sourcing, advertising	\$20,000
Candidate Screening & Shortlisting	10 profiles, checks, interviews	\$17,500
Executive Committee Support	Interview design, facilitation	\$15,000
Final Selection & Negotiation Support	Negotiations, transition support	\$10,000
Flat Fee – All Services		\$75,000
Reimbursable Expenses (capped)	Travel, ads, portal hosting	\$3,500
Total Proposed Cost		\$78,500 (Not-to-Exceed)

### 3. References

- National Public Utility Client – Senior operations leadership placement-  
Chantel@thegriffincollective.com
  - Higher Education Institution – Director/VP level executive search- [cdavid@david.associates.com](mailto:cdavid@david.associates.com)
  - Municipal Government Agency – Senior administrators- [Dwoods@urbanleague.com](mailto:Dwoods@urbanleague.com) or  
[dwoodsassist1@gmail.com](mailto:dwoodsassist1@gmail.com)
- (Confidential details available upon request)

### 4. Other Information

Background check methodology, retention rate 92%, diversity outcomes 67%.

### 5. Acknowledgement of Agreement

No exceptions taken to NCPA's Consulting Services Agreement.

### 6. Safety Compliance

Workers' Compensation coverage maintained; proof provided on award.

#### Appendix A – Key Staff Resumes

##### Annie Pelissier

Title	Principal Consultant & Lead Recruiter
Professional Summary	20+ years HR & recruitment experience.
Certifications	SHRM-SCP; CPCC
Key Areas of Focus	Executive search, negotiation, leadership strategy

##### Senior HR Consultant

Title	Senior Consultant
Professional Summary	15+ years public sector HR consulting.
Certifications	SHRM-SCP
Key Areas of Focus	Recruitment compliance, classification

Recruitment Research Associate

Title	Research Specialist
Professional Summary	Sourcing, outreach, LinkedIn Recruiter certified.
Certifications	LinkedIn Certified
Key Areas of Focus	Talent pipelines, outreach

Background & Compliance Specialist

Title	Investigation Specialist
Professional Summary	Litigation reviews, risk mitigation.
Certifications	FCRA Certified
Key Areas of Focus	Background verification, compliance

HR Recruitment Coordinator

Title	Coordinator
Professional Summary	Supports project logistics and communications.
Certifications	PHR (in progress)
Key Areas of Focus	Coordination, candidate management

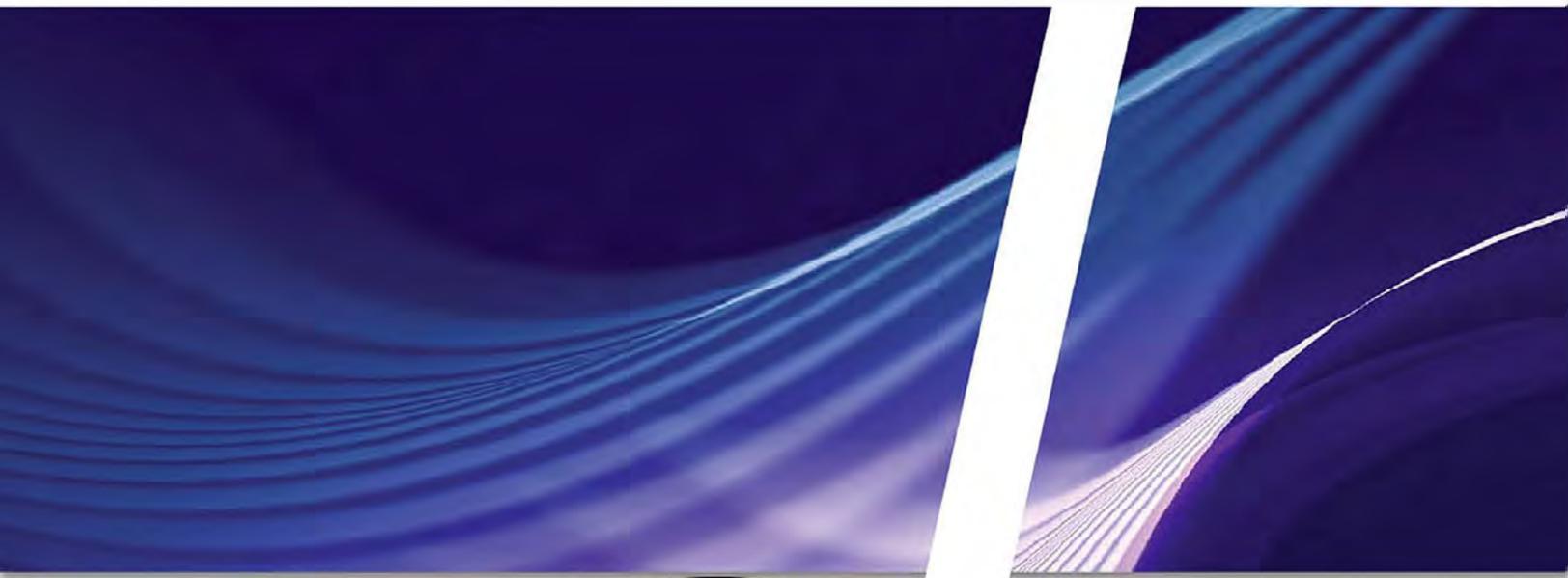
Appendix B – Compliance Documents

- ⇒ Certificate of Workers' Compensation Insurance
- ⇒ Acknowledgement of Agreement
- ⇒ Safety Compliance Certification

*Elevate Consultings, LLC maintains Workers' Compensation insurance and will provide certificates of coverage upon award of contract."*

*Annie Pelissier* CEO & Principal HR Consultant





**ZERO1 AGENCY LLC**

Oscar A. R. Chow / General Manager  
150 W. Ocean Blvd  
Long Beach CA 90802

oscar.chow@zero1.com | [REDACTED]

[zero1.com/recruiting](http://zero1.com/recruiting)

**Northern California Power Agency**

Request for Proposals (RFP)  
Executive Recruitment Service Providers

Official Proposal Response

September 18, 2025

# Cover Letter

September 18, 2025

RE: Executive Recruitment Service Providers

Northern California Power Agency (NCPA),

We appreciate the opportunity to submit our proposal to support the NCPA in recruiting its next General Manager. Our proposal outlines our qualifications, our approach, and details the costs related to our services. ZERO1 brings over a decade of success in recruiting Executives, Leadership, as well as diverse talent, for startups, Fortune 500 companies, and public sector organizations. Our main proposal response adheres to the page limit requirements (excluding the title page, section dividers, and appendix attachments).

## In support of this submission, we guarantee the following:

- I. We do not use subcontractors and have the expertise to successfully complete all deliverables.
- II. We will contract under your terms and conditions and meet the outlined insurance requirements.
- III. Our General Manager has signed this proposal and is authorized to bind us contractually.

Additionally, we understand the competitive nature of today's market, where top talent is selective and specialists are in short supply. Our success lies in our ability to assess candidates rigorously, engage them meaningfully, and guide an efficient process from outreach to hire. While many search firms leave roles open for months, our targeted, hands-on strategy enables us to deliver finalists in a matter of weeks. These capabilities position ZERO1 as a trusted and strategic recruitment partner.

## Our proposal outlines our qualifications and approach, driven by the following key elements:

1. **Extensive Experience:** Our team brings over 40 years of combined expertise across organizations of all sizes, successfully filling roles ranging from technical specialists to executive leadership.
2. **Customize Searches:** Each search is tailored to the role's objectives, desired outcomes, and ideal candidate profile.
3. **Fast Placements:** Our sourcing process is efficient and targeted. It allows us to close roles within weeks, not months.
4. **Proactive Sourcing Strategy:** Our recruitment approach targets ideal candidates directly. It has driven 90%+ of our successful placements and has resulted in faster, higher-quality hires.
5. **Robust Talent Pipeline:** We bring a robust and qualified network of global and diverse talent that strengthens your candidate pool across all leadership levels.

We look forward to supporting the NCPA, and thank you for your time and consideration of our proposal.

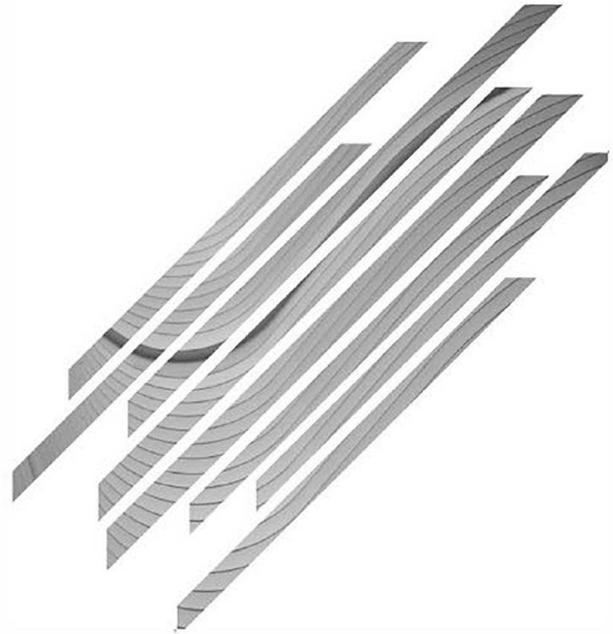
Sincerely,



Oscar A. R. Chow

Founder & General Manager // Zero1Agency LLC

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—	WORK PLAN & TIMELINE
—	SOURCING & QUALIFYING
—	PROJECT ROLES & COMMUNICATION
<b>3</b>	<b>PRICING PROPOSAL &amp; WARRANTY</b>
*	<b>APPENDIX</b> ( <i>Attachments, References, Resumes &amp; Sample Documents</i> )

SECTION

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# EXECUTIVE SUMMARY

# EXECUTIVE SUMMARY

ITEM	DETAILS
Company	ZERO1 AGENCY LLC
Founded	2014 – 11 Years in Business
Ownership	Privately Owned, Minority-Owned Business
Project Staff	2 Management, 1 Support Staff
HQ	150 W. Ocean Blvd, Long Beach CA 90802
Billing	40 E. Main St., Suite 717 Newark DE 19711
Website	www.zero1.com/recruiting
Contact	Oscar A. R. Chow - oscar.chow@zero1.com - <span style="background-color: black; color: black;">[REDACTED]</span>

### Managing the Recruitment Process

ZERO1 is engaged not only to fill critical roles but to lead and manage a comprehensive recruitment process. We evaluate and consider all candidates, whether internal, referred, or externally sourced, and guide the hiring team through each stage. Our role is to vet, qualify, and recommend the most aligned candidates. Our services conclude once an offer is made and accepted.

### Solving Strategic Hiring Challenges

Clients hire ZERO1 to solve these specific hiring challenges:

- **Executive & Senior Leaders:** Filling leadership roles with proven, high-impact performers.
- **Specialized Talent:** Securing hard-to-find technical or niche professionals.
- **Urgent Hiring Demands:** Rapidly filling multiple roles without sacrificing quality.

### Full Cycle Recruitment:

We follow a six-step recruitment process that covers everything from initial planning to final onboarding. The graphic below outlines how ZERO1 manages each stage to source and deliver top-tier candidates. Our approach is built to meet the needs of both public-sector and private clients, while always prioritizing speed, quality, and results.

	#	OVERVIEW
Preparation & Alignment	1	We align with the hiring team on the timeline, ideal candidate profile, skill set, salary range, and key success factors.
Sourcing Candidates	2	We use active recruitment strategies, including direct outreach, online platforms, and our professional network, to attract top talent.
Screening & Qualifying	3	Candidates are screened for competency, motivation, salary alignment, and overall fit. Afterwards, we submit detailed notes for each qualified individual.
Review & Selection	4	We present a shortlist of top candidates with assessment summaries. The hiring team then reviews profiles and resumes to select interviewees.
Hiring Team Interviews	5	Coordinate availability, finalize schedules, and support the hiring team with prep materials and logistics.
Hiring & Onboarding	6	We assist with final steps such as negotiations, background checks, and offer delivery to support a seamless onboarding process.

### A Targeted, Proactive Approach

We use a proactive recruitment approach called ASDO (Active Sourcing & Direct Outreach). It is designed to close roles faster, smarter, and with stronger alignment by directly engaging top candidates and avoiding the inefficiencies of passive recruiting. This strategy drives over 90% of our placements and leads to faster offers, stronger fit, and long-term success.

Here are the core benefits:



### Qualifying Candidates

Once we identify promising candidates, we conduct a structured vetting process that includes resume reviews, phone interviews, and salary alignment discussions. We assess qualifications, motivation, readiness to relocate (if applicable), and overall alignment with the role before presenting only the strongest finalists to your team.

### Executive Candidate Summaries

For each finalist, we deliver a detailed Executive Candidate Summary outlining their experience, qualifications, and alignment with the role. These summaries are designed to streamline hiring team decisions and are accompanied by the candidate's resume, cover letter, and other applicable documents.

### Structured Communication:

We provide biweekly updates, schedule check-in calls as needed, and remain flexible to your preferred methods of communication. This ensures transparency, responsiveness, and alignment from start to finish.

### Placement Warranty:

If a candidate departs within the guarantee period, we'll redo the search at no additional agency fee. Please see the warranty page for more details.

### Project Staffing

Oscar A. R. Chow, our Head of Recruiting, will lead this project from kick-off to completion. He'll oversee all phases of the engagement, guide the recruitment strategy, and ensure each milestone is delivered successfully. Supporting him is Jen Alvares, our Operations Manager, who will manage logistics, coordinate candidate communication, and help keep the process smooth and responsive for everyone involved.

 <p><b>OSCAR A. R. CHOW</b> PROJECT MANAGER</p> <p>Manages Client Communication Oversees Project Deliverables Drives Accountability</p>	 <p><b>JEN ALVARES</b> OPERATIONS MANAGER</p> <p>Manages Candidate Needs Provides Logistical Support Oversees Outreach</p>
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### Next Steps

In the following sections, we provide a comprehensive overview of our Work Plan Approach. We've provided sample materials, such as *candidate summaries* and *recruitment brochures*, for your review in the appendix.

SECTION

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# QUALIFICATIONS & PROJECT APPROACH

# ABOUT US

## COMPANY & LEADERSHIP

ZERO1 is a professional services firm founded in 2014 that specializes in recruiting leadership and technical talent. We support Fortune 500 companies, and public agencies nationwide, helping them close high-impact roles quickly through a rigorous and strategic hiring process.



**OSCAR A. R. CHOW**  
Head of Recruiting

- Founder of ZERO1, leading executive and technical searches nationwide
- 20+ years of recruitment and leadership development experience
- Multiracial business leader (Black, Hispanic, & Asian) with a global perspective
- Expertise in both public and private sector executive recruitment
- Proven track record securing high-impact leaders across industries



**JEN ALVA**  
Head of Operations

- 18+ years recruiting top talent across public and private sectors
- Specializes in executive-level searches and leadership coaching
- Deep experience with corporate, municipal, and public agency roles
- Trusted advisor to GLG, Guidepoint, AlphaSights, and global firms
- Extensive expertise in developing leaders to drive organizational growth

## EXPERIENCE PROVIDING SERVICES

ZERO1 brings proven experience recruiting leaders for critical roles across a range of sectors and industries. We've placed Directors, Deputy Directors, Chiefs, Executives, and other hard-to-fill positions and we bring deep strategic insight to every search. Oscar Chow, our Head of Recruiting, previously supported the presidential selection process at Temple University and possesses extensive relationships with executive-level talent. We bring the experience and relationships needed to support the NCPA, both in meeting your immediate recruitment needs and across all role types in the future.



## CORPORATE COMPLIANCE SNAPSHOT

ITEM	DETAILS
Business Stability	ZERO1 has no pending litigation, liabilities, or instability.
Insurance	Fully insured through Chubb; COIs available upon award.
Subcontracting	ZERO1 performs all work in-house and does not subcontract.
Conflicts	We have no conflicts of interest with the NCPA.
Ownership	Minority-owned business (MBE) of Black, Hispanic, and Asian descent.
Registration	Registered in CA, WA, DE, CT, FL; additional registrations handled upon award.

## EXPERIENCE HIGHLIGHTS

Below are selected highlights that demonstrate how we've helped our partners fill critical leadership, technical, and operational roles across sectors. Our work spans a wide range of hard-to-fill positions, reflecting our ability to adapt to complex hiring needs across industries, functions, and organizational levels.



**Client:** Cummins-Meritor    **Industry:** Automotive    **Location:** Global

Cummins-Meritor is a Fortune 500 company and one of the world's largest automotive suppliers. They needed help securing talent across all levels. We secured specialized personnel who could lead cross-functional teams, drive electrified tech and software development, and oversee key manufacturing operations.



**Client:** One Drop    **Industry:** Tech    **Location:** USA

One Drop was a health tech company focused on digital diabetes management and real-time biomarker tracking. It was still growing and needed support building out teams at all levels. We helped attract key technical talent along with leadership with the expertise and strategic vision needed to drive innovation.



**Client:** Calvin Klein    **Industry:** Apparel    **Location:** USA

Calvin Klein sought a new Global Marketing Director to lead its new in-house advertising agency. Their recruiting agency white-labeled us to assist because they lacked the relationships and expertise to close the role. Within two weeks, our recommendation from a competing apparel brand was hired for the position.



**Client:** Temple University    **Industry:** Education    **Location:** USA

Oscar A. R. Chow, Head of Recruiting, served as a non-voting advisory member of the Board of Trustees at Temple University. He contributed to multiple committees, including the Presidential Search Committee, where he played a key role in vetting and interviewing candidates, and ultimately recommended the election of the first woman to lead the University.



**Client:** City of Hartford    **Industry:** Municipality    **Location:** USA

The City of Hartford, Connecticut is one of the oldest municipalities in the U.S. The city was seeking support in identifying experienced public sector leaders to guide critical departments and initiatives. We partnered with Hartford to recruit senior-level talent, helping them attract candidates with the expertise and civic leadership skills needed to navigate complex municipal challenges and deliver long-term impact.



**Client:** White Label Projects    **Industry:** Various    **Location:** North America

We're frequently white-labeled under NDAs by larger agencies that turn to us when they need additional capacity or deeper access to hard-to-reach talent pools. With extensive hiring expertise across both the public and private sectors, we bring long-standing relationships and a proven track record recruiting across executive leadership, operations, public safety, technology, infrastructure, and more, spanning all levels and organizational functions.

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SECTION DIVIDER

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# Work Plan & Timeline

# WORK PLAN OVERVIEW

This section outlines each phase of our six-step recruitment process, along with the strategic practices and tools that support successful execution. All supporting materials are included in the appendix.

## 1. Preparation & Alignment

- **Job Description Review:** We collaborate with HR to refine job descriptions and align on the ideal candidate profile.
- **Kick-Off Meeting:** We confirm qualifications, salary expectations, benefits, relocation, and timeline.
- **Candidate Brochure:** For leadership roles, we develop a role-specific brochure highlighting key selling points. *(See appendix)*

## 2. Sourcing Candidates

- **Active Sourcing & Direct Outreach (ASDO):** We proactively identify and directly engage candidates who align with your ideal profile. This approach drives over 90% of our successful placements. *(See upcoming section)*
- **Network Engagement:** We source candidates through referral networks, professional communities, and targeted outreach.
- **Passive Recruitment Strategies:** We generally avoid job boards and generic advertising, as they tend to attract lower-fit applicants and slow down the hiring process. When appropriate, we're happy to tailor a targeted ad campaign to support your goals. This line item is optional, billed separately, and often reduces unnecessary spend.
- **Candidate Confidentiality:** We protect candidate privacy and use preferred communication channels throughout the process.
- **Diverse Talent Pools:** We also recruit diverse and highly qualified professionals, while adhering to EEO and fair hiring practices.

## 3. Screening & Qualifying

- **Qualifying & Screening:** We conduct resume reviews, phone interviews, and evaluations of motivation, relocation readiness, and salary expectations to ensure a strong match with your hiring criteria. *(See upcoming section)*
- **Salary Alignment:** We use your target salary range to pre-negotiate with candidates. It drives alignment and increases the likelihood of accepting a final offer.
- **Executive Candidate Summary:** Crafted and delivered for each shortlisted candidate, outlining their qualifications, experience, and overall fit for the role. *(See appendix)*

## 4. Review & Selection

- **Shortlist Presentation:** We prioritize quality over volume, typically presenting 3–5 finalists.
- **Hiring Team Feedback:** We welcome timely feedback on both selected and rejected candidates to continuously refine & improve the search.

## 5. Hiring Team Interviews

- **Interview Coordination:** We manage availability and assist HR in scheduling interviews. Typically, invitations are scheduled and hosted through HR's internal system.
- **Evaluation Packets:** We can provide custom interview packets with questions, scoring criteria, and space for notes.
- **Onsite Interview Logistics:** Typically, we advise candidates to make their own travel arrangements (e.g., airfare, lodging, auto, per diem), which are then reimbursed directly by the NCPA in accordance with your internal policies. We coordinate schedules, provide

logistical support, and communicate allowable travel parameters to ensure alignment with your policies and budget.

- **Candidate Communication:** We promptly notify candidates of their interview status, ensuring timely and respectful communication to support a positive experience.

## 6. Hiring & Onboarding

- **Background Checks:** We coordinate with Checkr, a trusted global third-party provider, to verify education, employment history, and conduct criminal background screenings.
- **Drug Testing:** Typically handled by the employer. We can assist if needed.
- **Salary Negotiation & Offer:** We assist with final negotiations and offer communication. HR typically leads the benefits discussion directly with candidates.
- **Onboarding Support:** We facilitate onboarding paperwork, address candidate questions, and ensure a smooth transition.

### \*Enhancing Success

- **Critical Success Factors:** Speed, communication, and a simplified hiring process are crucial for success. Clients who move swiftly and provide prompt feedback close roles up to six times faster than their competitors.
- **Reporting Structure:** We provide weekly updates and customizable reporting to ensure transparency. *(See upcoming section)*
- **Relocation Support:** Supporting relocation expands the candidate pool and improves offer acceptance for out-of-state talent.

# RECRUITMENT TIMELINE OVERVIEW

Our timeline outlines a comprehensive 90-day process from kickoff to placement. While designed to accommodate the longer cycles often associated with leadership roles, most searches are completed in a fraction of that time. Our most successful clients finalize placements in as little as 30–45 days, depending on engagement levels and internal interview speed. The timeline is flexible and can be adjusted based on your organization’s needs and the urgency of the role.

TIMELINE	MILESTONE	ACTIVITIES
Week 1	Preparation & Alignment	Define ideal candidate profile; finalize recruitment strategy with HR
Weeks 2–5	Sourcing & Outreach	Active sourcing, direct outreach, network engagement, advertising as needed
Weeks 2–5	Screening & Qualifying	Resume reviews, phone interviews, salary alignment, candidate assessments
Weeks 5–6	Review & Selection	Present top 3–5 candidates; gather collaborative feedback
Weeks 7–9	Hiring Team Interviews	Coordinate interviews; provide evaluation tools; support onsite logistics
Weeks 10–12	Hiring & Onboarding	Assist with offer finalization, background checks, and onboarding support

# STAKEHOLDER ROLES & RESPONSIBILITIES

The table below outlines how ZERO1, HR, and the Hiring Team collaborate across each stage of the recruitment process. This clarity helps ensure shared accountability, efficient execution, and a seamless candidate experience.

#	OVERVIEW	STAKEHOLDER
[Redacted]	[Redacted]	HR
	[Redacted]	
[Redacted]	[Redacted]	
	[Redacted]	
[Redacted]	[Redacted]	
	[Redacted]	
	[Redacted]	HR
[Redacted]	[Redacted]	HR, Hiring Team
	[Redacted]	
	[Redacted]	HR
[Redacted]	[Redacted]	
	[Redacted]	Hiring Team
	[Redacted]	HR, Hiring Team
	[Redacted]	
	[Redacted]	
	[Redacted]	HR
	[Redacted]	Hiring Team
	[Redacted]	
[Redacted]	[Redacted]	HR
	[Redacted]	

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SECTION DIVIDER

# Sourcing & Qualifying

# SOURCING APPROACH: CORE STRATEGY

## OUR APPROACH:

Many organizations waste valuable time reviewing countless applications to find candidates who fit their needs. Additionally, they often struggle to reach ideal candidates due to a lack of recruitment expertise, industry connections, and effective technological tools. At ZERO1, we address these challenges with our **Active Sourcing and Direct Outreach (ASDO)** approach, a more efficient recruiting process and our core strategy, built on three key pillars:



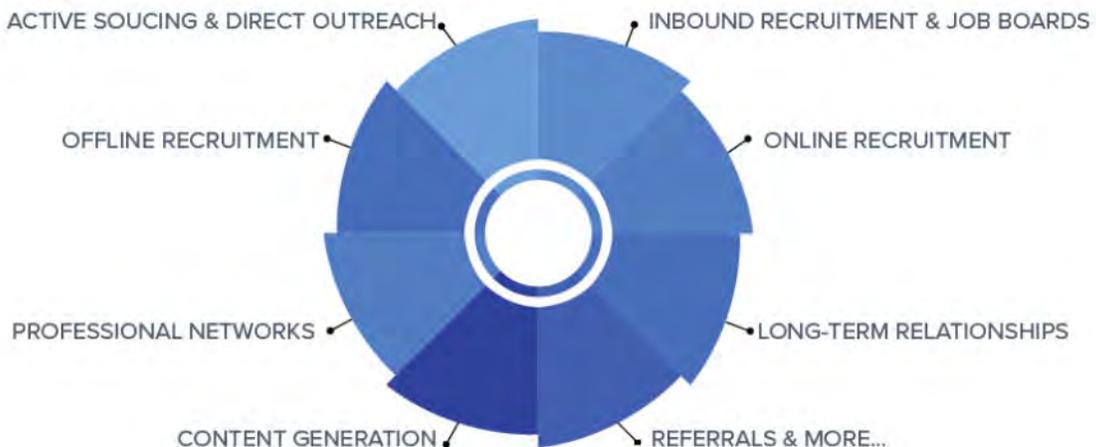
## OUR ADVANTAGES:

Our approach provides three key strategic advantages:

- **Shorter Time-to-Hire:** Effective and efficient outreach significantly shortens hiring timelines.
- **Reduced Competition:** Higher candidate engagement lowers the likelihood of competing offers.
- **Higher Acceptance Rates:** Genuine interest leads to stronger commitment & acceptance rates.

In closing, as the market becomes more demanding and roles grow more complex, our proactive approach enables us to meet these challenges by consistently building strong, long-term relationships with top candidates. By leveraging this strategy, we have achieved a 90% success rate in filling roles using ASDO techniques alone. Below, we outline key supporting tactics that work in tandem with our core sourcing strategy to effectively fill positions.

GRAPH: KEY SUPPORTING SOURCING TACTICS

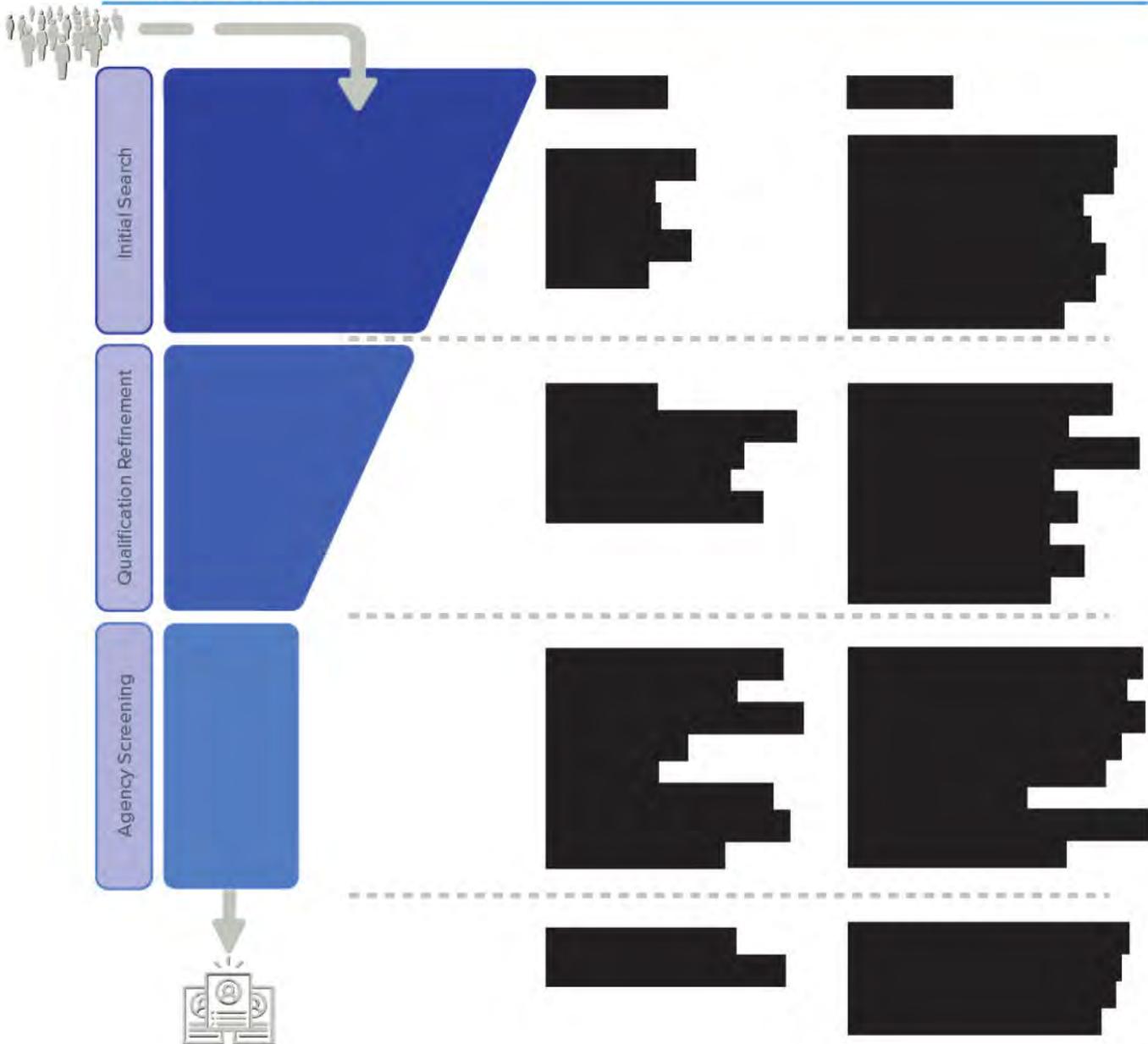


# QUALIFYING APPROACH: EVALUATION STRATEGY

## SCREENING & EVALUATION

The funnel below gives a high-level overview of how we screen and qualify candidates. Once we align on the core aspects of the role, we conduct a targeted search, review each candidate's background and experience, and narrow the pool by focusing on behavior, motivation, and long-term fit. Our goal is to deliver well-aligned, engaged candidates, each presented with a detailed Executive Candidate Summary to support a smooth interview process.

GRAPH: FUNNEL PROCESS



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SECTION DIVIDER

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# Project Roles & Communication

## KEY PERSONNEL OVERVIEW

This engagement will be led by senior personnel from ZERO1 who will provide hands-on oversight from kickoff through placement. The team below will be directly responsible for project delivery and communication.

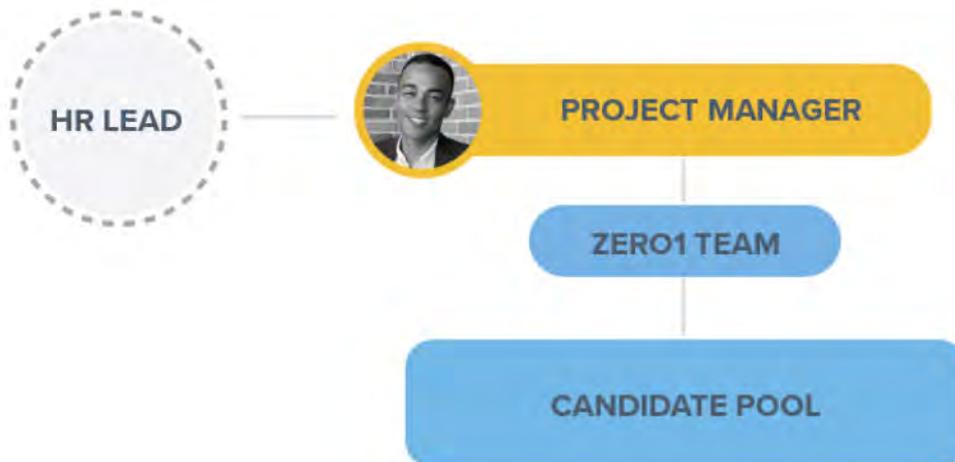
- **Oscar Chow, Project Manager:** Leads all phases of the engagement, oversees strategy, and ensures successful delivery of every project milestone
- **Jen Alvares, Operations Manager:** Supports candidate logistics, manages communication touch points, and ensures a smooth and responsive process for all parties.

 <p><b>OSCAR A. R. CHOW</b> <b>PROJECT MANAGER</b></p> <p>Manages Client Communication Oversees Project Deliverables Drives Accountability</p>	 <p><b>JEN ALVARES</b> <b>OPERATIONS MANAGER</b></p> <p>Manages Candidate Needs Provides Logistical Support Oversees Outreach</p>
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## COMMUNICATION STRUCTURE

Oscar will communicate directly with the HR Lead and oversee all deliverables to ensure project success. He will be responsible for all tasks, stakeholder communication, and the overall success of the project. We value ownership, accountability, and streamlined communication, which ensures that all project objectives are effectively managed.

GRAPH: FIRMS CHAIN OF COMMAND & COMMUNICATION STRUCTURE



# COMMUNICATION PLAN

Below are the primary communication methods we use to support clients across time zones. Remote collaboration drives 99% of our engagements, enabling faster decisions, greater flexibility, and real-time responsiveness across time zones. Our approach is flexible, so we're able to align with whatever communication style works best for your team.

- **Kick-Off Meeting:** Conducted remotely via video conferencing.
- **Meetings and Updates:** Conducted remotely via email, phone, and video conferencing.
- **Hiring Team Interviews:** Typically internal, but if invited, we participate remotely via video.
- **In-person Meetings:** Rare and situational, arranged on a case-by-case basis if needed.

Meeting / Status	Email	Phone	Video	In-Person
Kick-Off Meeting			✓	
Meetings & Updates	✓	✓	✓	
Hiring Team Interviews			✓	<b>Situational</b>
Post Interview Feedback	✓	✓	✓	
Quarterly Meetings		✓	✓	

# REPORTING TYPES

The chart below outlines our core reporting types. Additionally, we're always available for real-time updates or questions via email, phone, or video. We believe regular communication keeps everyone informed, facilitates swift decision-making, and helps close roles more quickly.



SECTION

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# PRICE PROPOSAL & WARRANTY

# PRICING PROPOSAL BREAKDOWN

## Pricing Proposal

We propose the following flat fee per role, which covers all core recruiting activities from kick-off to completion as outlined in this proposal, and \$5,000 for discretionary expenses (see section below)

→ **General Manager - \$21,000**

## Billing

Payments will be rendered to ZERO1 upon completion of each milestone as outlined below:

MILESTONE	MILESTONE DESCRIPTION	FIRM FIXED PRICE
1	Completion of Project Kickoff and Role Alignment	1/3 of total fee
2	Completion of Sourcing, Screening and Candidate Shortlist	1/3 of total fee
3	Completion of Final Candidate Selection and Offer Acceptance	1/3 of total fee

## Discretionary Expenses

The following items are considered discretionary expenses and are not to exceed \$5,000. Expenses are only incurred when requested in advance by the client and are billed separately on a monthly basis. Typically, they have averaged \$350 total per role, to cover a finalist background check.

- **Candidate Background Checks:** Includes education verification, criminal screening, etc.
- **Agency Travel:** Most engagements are typically remote, so travel tends to be rare & infrequent.
- **Incidental:** Copying, mailing, printing, or other minor administrative costs.
- **Paid Advertising:** Used only upon client request to supplement our proactive sourcing strategy.

◆ **Note:** Paid Advertising may include job boards, ad placements (web or print), or targeted ad campaigns to boost role visibility. In most engagements, these tactics haven't been necessary to successfully fill a role, as they often dilute the candidate pool with lower-quality applicants.

## What's Not Included in Our Agency Fee

The following items are not included in our agency fee and are typically covered directly by the employer or billed separately, if needed:

- **Candidate Drug Testing:** We can assist with coordination upon request.
- **Candidate Relocation Cost:** Covers moving-related expenses.
- **Candidate Legal Fees:** Includes visa processing, legal consultations, etc.
- **Client Interview Costs:** Includes meeting spaces, hospitality, audio/video equipment, or supplies.
- **Candidate Travel Cost:** Includes airfare, lodging, car rental, per diem, etc.

◆ **Note:** Employers typically reimburse candidates directly for travel-related expenses. In cases where ZERO1 is asked to cover these costs upfront for a candidate (e.g., airfare, lodging, per diem), we can do so upon request. A 20% convenience fee will be applied to the reimbursed amount.

## Our Role in the Process

Our fee structure provides transparency, budget predictability, and a focus on delivering results, not inflating compensation packages. Our model ensures we remain fully invested in managing the process from start to finish.

**We are being hired to manage a thorough recruitment process. To support that role, we:**

- Evaluate and consider all candidates, whether internal, referred, or externally sourced.
- Welcome HR and hiring teams to recommend any candidate for our review.
- Conclude our services once a candidate, internal or external, accepts the offer.
- Apply our full fee if any candidate vetted by ZERO1 is hired within one year of the engagement.

**EXHIBIT B****COMPENSATION SCHEDULE AND HOURLY FEES**

Compensation for all tasks, including hourly fees and expenses, shall be \$21,000, subject to Section 2 of the Agreement. The hourly rates and/or compensation break down and an estimated amount of expenses is as follows:

**General Manager - \$21,000**

The payment schedule for Consultant is:

**See Below**

**Milestone 1 — Completion of Project Kickoff and Role Alignment — 1/3 of total fee**

**Milestone 2 — Completion of Screening & Presenting Candidates — 1/3 of total fee**

**Milestone 3 — Completion of Final Candidate Selection and Offer Acceptance — 1/3 of total fee**

NOTE: As a public agency, NCPA shall not reimburse Consultant for travel, food and related costs in excess of those permitted by the Internal Revenue Service.

# GUARANTEE & WARRANTY PERIOD

## Performance Guarantee

At ZERO1, we stand by the quality of our recruitment services and are committed to ensuring the success of every placement. To demonstrate this commitment, we will offer the following guarantee period. Our guarantee reflects our confidence in the candidates we provide and our dedication to their long-term success within your organization.

ROLE TYPE	GUARANTEE PERIOD
Director / Executive Level	1 Calendar Year

## Warranty Policy

**Overview:** If a ZERO1-referred and employed candidate is terminated for cause or resigns, except in the case of death, within the specified guarantee period, ZERO1 will provide professional recruiting services to appoint a replacement candidate at no additional agency fee. ZERO1 will proactively recruit and screen qualified replacements until an offer is made and accepted.

**Exclusions:** This guarantee does not cover situations where the position is eliminated due to layoff, downsizing, reorganization, sale or merger, insufficient work, promotion, or reassignment within the initial employment period.

**Limitations:** This warranty is a one-time replacement guarantee applicable only to the initially hired candidate, with replacement candidates not subject to further guarantees or warranties.

**Expenses:** Clients are responsible for expenses such as candidate interview travel costs, re-advertising, additional background checks, drug screening, candidate relocation costs, legal fees, optional expenses, etc.

## Shared Responsibility and Partnering for Success

While ZERO1 supports hiring teams in identifying and presenting qualified candidates, the final hiring decision ultimately rests with the organization. We believe accountability flows both ways: we stand behind our work with a guarantee, and we rely on our partners to rigorously assess candidates and foster environments where employees can thrive. To date, we've never had to exercise our guarantee, reflecting both the strength of our placements and the diligence of the clients we serve. We remain committed to shared success and believe that collaboration leads to the best outcomes.

# Closing Letter

### The Practice of Recruiting

Similar to industries like medicine and law, we view recruiting as a discipline that demands ongoing practice. It requires:

1. Continuous relationship building to attract the best candidates in the market
2. Adapting to evolving market demands to meet clients' needs.

### Relationships Are Everything

We have nurtured thousands of relationships with professionals over the years and use those contacts to help close positions for our clients. Candidates also refer us regularly because they respect our company and our professionalism and because we treat them with a sense of human decency that other agencies often overlook.

For example, candidates are free to message us at any time, and we provide prompt updates, honest guidance, interview prep and resume adjustments, informative newsletters, and more. Like our clients, we view our relationship with candidates as a vital aspect of our business success.

### Future-Ready, People-First

As the market continues to evolve, we're focused on balancing innovation with connection. We thoughtfully incorporate new technologies while preserving a personal

candidate experience. This approach helps us stay ahead of employment demands, identify best practices, and deliver more effective recruitment solutions, while attracting the best talent in the market.

This proposal reflects our years of experience, and we hope you've found it insightful.

Thank you for your time and consideration. We look forward to the opportunity to support your team and would be honored to serve as your recruitment partner.

“The quality of our work represents our brand. Our goal is to understand our clients’ needs and support them in achieving success. We prioritize performance and results, and we trust that it shows.”



**OSCAR A. R. CHOW**  
 Founder & Head of Recruiting

# THE --- APPENDIX

This appendix offers additional context for those seeking a deeper understanding of our methodology and process. It includes expanded strategy details and sample documents to provide added insight.

<b>1</b>	<b>REQUIRED ATTACHMENTS</b>
<b>2</b>	<b>REFERENCES</b>
<b>3</b>	<b>RESUMES</b>
<b>4</b>	<b>SAMPLE DOCUMENTS</b> <i>(Brochure &amp; Executive Candidate Summary)</i>

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SECTION DIVIDER

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# Required Attachments

**XIV. INDEMNIFICATION**

Consulting firm shall indemnify, defend with counsel reasonably acceptable to the Agency, and hold harmless the Agency, and its officials, commissioners, officers, employees, agents and volunteers from and against all losses, liabilities, claims, demands, suits, actions, damages, expenses, penalties, fines, costs (including without limitation costs and fees of litigation), judgments and causes of action of every nature arising out of or in connection with any acts or omissions by Consulting firm, its officers, officials, agents, and employees, except as caused by the sole or gross negligence of Agency. Notwithstanding, should this Agreement be construed as a construction agreement under Civil Code section 2783, then the exception referenced above shall also be for the active negligence of the Agency.

**XV. ATTACHMENTS**

- Appendix "A": Consulting Services Agreement
- Appendix "B": General Manager Job Description

**PROPOSER:**

**Company:** ZERO1 AGENCY LLC

**Address:** 150 W. OCEAN BLVD, #1102, Long Beach CA 90802

**Signed:** *Oscar Chow* **Title:** General Manager

**Print Name:** Oscar A. R. Chow **Telephone:** ( ) ██████████

**E-mail:** oscar.chow@zero1.com **Date:** 09/18/2025

**EXHIBIT C  
CERTIFICATION**

**Affidavit of Compliance for Contractors**

I, Oscar A. R. Chow / General Manager

(Name of person signing affidavit)(Title)

do hereby certify that background investigations to ascertain the accuracy of the identity and employment history of all employees of ZERO1 AGENCY LLC

(Company name)

for contract work at:

LODI ENERGY CENTER, 12745 N. THORNTON ROAD, LODI, CA 95242  
Executive Recruitment Service Providers - Roseville, CA 95678  
(Project name and location)

have been conducted as required by the California Energy Commission Decision for the above-named project.

*Oscar Chow*

(Signature of officer or agent)

Dated this 18th day of September, 2025.

THIS AFFIDAVIT OF COMPLIANCE SHALL BE APPENDED TO THE PROJECT SECURITY PLAN AND SHALL BE RETAINED AT ALL TIMES AT THE PROJECT SITE FOR REVIEW BY THE CALIFORNIA ENERGY COMMISSION COMPLIANCE PROJECT MANAGER.



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SECTION DIVIDER

# References









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SECTION DIVIDER

# Resumes



Resume / Professional Highlights

# OSCAR A. R. CHOW

<p><b>Experience</b></p> <p>20+ Years</p>	<p><b>Position</b></p> <p>Head of Recruiting</p>	<p><b>Project Role</b></p> <p>Key Personnel &amp; Project Manager</p>	<p><b>Expertise</b></p> <p>Recruiting &amp; Hiring Talent Strategy</p>
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**HIGHLIGHTS**

**Experience:**

- Seasoned executive with over 23 years of experience in talent acquisition and leadership development, specializing in recruiting top-tier talent across varying industries & sectors.
- Played a pivotal role at Red Bull, joining shortly after its entry into the North American market. Over a 13-year tenure, he led strategic committees to develop unique hiring strategies and comprehensive recruitment processes for a company that grew to over \$7B in revenue.
- Oversaw key markets including PA, MD, DC, and VA, and in his final role as a Senior Executive, he managed operations in New York, Red Bull's largest market globally, focusing on hiring, management, training, and execution.
- Served on the board of Temple University during 2005/2006, where he led the selection committee for the University's Ninth President, showcasing a talent for identifying top talent in public sector leadership roles.
- Founded ZERO1 with a mission to assist companies in securing top-tier talent, supporting brands such as Calvin Klein, Spotify, WeWork, Google, and more in various capacities.
- Advises for Guidepoint, GLG, and AlphaSights, providing their clients with strategic insights across various industry topics.

**Expertise:**

- **Recruitment Specialist:** Engages with recruitment leaders to discuss strategies and professional development, driving innovation and best practices.
- **Professional Developer:** Curates a specialized newsletter, engaging a large audience with insights on recruitment strategies and candidate development.
- **Strategic Consultant:** Provides guidance to brands on shaping recruitment strategies, developing talent, and optimizing business outcomes.

**Qualifications:**

- **Diverse Leadership Perspective:** As a multi-racial business leader of Black, Hispanic, and Asian descent, brings a multi-faceted lens that enhances the recruitment of talent across all leadership levels.
- **Proven Recruitment Success:** Demonstrates a strong track record of identifying, attracting, and retaining top talent, significantly improving recruitment outcomes in competitive markets.
- **Organizational Alignment Expertise:** Expert in aligning candidate capabilities with organizational goals, ensuring optimal recruitment outcomes and long-term success.
- **Education:** Bachelors in Political Science, Temple University



Resume / Professional Highlights

# JEN ALVARES

<p><b>Experience</b></p> <p>18+ Years</p>	<p><b>Position</b></p> <p>Operations Manager</p>	<p><b>Project Role</b></p> <p>Key Personnel &amp; Project Support</p>	<p><b>Expertise</b></p> <p>Recruiting &amp; Hiring Talent Development</p>
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## HIGHLIGHTS

### Experience:

- Brings over 18 years of experience placing top-tier candidates across public and private sectors, with a focus on executive-level leadership.
- Launched her career recruiting for high-impact projects in media and entertainment before expanding into leadership searches across corporate, municipal, and public sector organizations.
- Operations Manager & Recruiter for ZERO1, facilitating seamless career transitions and providing tailored support to candidates from various backgrounds, ensuring the successful placement of qualified professionals in pivotal roles.
- She specializes in recruiting and operations management, overseeing talent, and leveraging her connections and insights to identify and attract top candidates for critical positions.
- Provides strategic guidance to global consulting firms such as GLG, Guidepoint, AlphaSights, Link Global, Accenture, etc.
- Clients include: Amazon, ESPN, NBA, Coca-Cola, Samsung, Nissan, Sisley Paris, L'Oréal, General Motors, Wargaming, Dell, GoDaddy, Barclays, and others.

### Expertise:

- **Career Development Strategist:** Author of the course "Produce Your Career," part of her signature series "Produce Your Future," which provides actionable strategies for career success focused on long-term fit and growth potential.
- **Career Guide:** Leverages her unique methodology to help individuals navigate their career paths and maximize their potential, aligning candidate strengths and aspirations with organizational needs for successful placements.

### Qualifications:

- **Talent Management and Development:** Recognized leader in developing and managing careers across diverse industries, with a proven track record of identifying and placing top-tier candidates in key roles.
- **Career Coaching and Support:** Has guided countless individuals in clarifying career objectives and overcoming obstacles, fostering a supportive recruitment approach that emphasizes long-term fit and mutual growth.
- **Education:** LL.B. & LL.M. Bachelor & Master of Laws (International Equivalent), MSAL

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SECTION DIVIDER

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# Sample Documents















THANK YOU

September 18, 2025

Northern California Power Agency  
651 Commerce Drive  
Roseville, CA 95678  
Attn: Brynna Bryant, NCPA Executive Recruitment Services

Dear NCPA Representative,

On behalf of Mycoff Fry Partners LLC, I am pleased to submit our proposal to assist the Northern California Power Agency (NCPA) in recruiting its next General Manager.

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**Executive Summary:**

Founded in 1974, Mycoff Fry Partners is a national leader in executive recruitment for the utility industry. We have successfully placed more than 220 chief executives and hundreds of senior officers across municipally owned utilities, joint action agencies, cooperatives, and a wide variety of connected and supporting electric utility organizations.

For this engagement, I will personally lead the search with the support of one of our Senior Executive Recruiters. Our process includes in-depth information gathering, development of a comprehensive position profile, targeted recruitment and advertising, candidate evaluation and screening, facilitation of interviews, professional reference checks, and assistance with contract negotiations. We emphasize confidentiality, diversity, and cultural fit throughout the process, guided by my nearly 30 years of experience assisting utility governing bodies with leadership recruitment.

**Legal Information:**

Proposer: Scott A. Fry, Managing Director; (303) 607-5373 Main; (303) 717-6595 Cell; [sfry@mfpllc.us](mailto:sfry@mfpllc.us)  
Legal Form: Mycoff Fry Partners is a Limited Liability Company owned and managed by Scott Fry, Lanie Mycoff, and Carl Mycoff. The firm's mailing address is P.O. Box 1310, Conifer, Colorado, 80433 and its principal address is 28803 Loa Lane, Conifer, Colorado 80433.

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I would highlight attention to the enclosed draft timeline. Considering the anticipated General Manager start date of March 2026 and the assumed approval of the successful recruitment firm in October of 2025, I suspect compression of necessary activities and a need to either stretch the target start date or begin as quickly as possible.

NCPA will benefit from our extensive industry network, proven methodology, and strong record of repeat client partnerships that include many utilities in your region. We are committed to providing a seamless and highly communicative process that delivers a leader well-suited to guide NCPA's future.

Thank you for the opportunity to submit this proposal. We look forward to working with you on this important leadership transition.

Sincerely,  
**Scott A. Fry**  
**Managing Director**  
**Mycoff Fry Partners LLC – (303) 717-6595 (Cell); [sfry@mfpllc.us](mailto:sfry@mfpllc.us)**



MYCOFF FRY PARTNERS LLC  
Executive Recruiters for the Utilities Industry

Executive Recruitment Proposal

NORTHERN CALIFORNIA POWER AGENCY  
GENERAL MANAGER

September 18, 2025

## Objective

Mycoff Fry Partners will conduct an executive search campaign to recruit a General Manager for the Northern California Power Agency (NCPA) in Roseville, California.

## Mycoff Fry Partners Overview

Mycoff Fry Partners, formerly known as Mycoff & Associates, was founded in 1974. Our firm is a recognized leader in the recruitment of executives, management personnel, and industry experts for electric and multi-service utilities. Our clients include:

- Municipally owned joint action agencies
- Municipally owned utilities cooperatives
- Rural distribution and G&T cooperatives
- Public power districts
- Investor-owned utilities
- Regional Transmission Operators/ Independent System Operators
- Transmission companies
- Utility software providers
- Middle-mile fiber consortiums
- Non-utility generators
- Reliability organizations
- Energy marketers
- Industry Associations
- Consultants serving these industries

We maintain an extensive database of executives, management personnel, and industry experts in every region of the country. Our database is the primary source of potential candidates for every search we conduct.

During our history, we assisted in the selection of over 220 chief executives and hundreds of senior officers. We are proud of the repeat business we enjoy with our clients, which we feel is the true measure of success. A partial listing of previously completed engagements is attached. Feel free to contact any of these references to verify our past performance.

The firm carries a historical success rate of nearly 93% including Chief Executive or General Manager placements that remained in their role and met expectations. This number increases to just under 97% since the year 2000.

## Search Manager and Search Team

Scott Fry and Lanie Mycoff are Managing Directors of Mycoff Fry Partners, LLC, and joined the firm in 1996. Scott Fry will lead this search engagement with support from one of our Senior Recruiters. The Senior Recruiter's role will focus on networking the opening, candidate sourcing, and preliminary discussions with potential candidates. Scott Fry will oversee and participate in those activities, serve as primary client contact, and manage all other recruitment-related work associated with this search and selection effort.

Mr. Fry's Profile:

Scott began employment with Mycoff & Associates in 1996. He managed and completed searches for Presidents and Chief Executive Officers, Chief Operating Officers, Chief Financial Officers, Executive Vice Presidents, General Counsels, Vice Presidents, General Managers, Directors,

Managers, Supervisors, and other key level expert personnel. His clients include public power organizations, joint action agencies, rural cooperatives, generation & transmission cooperatives, investor-owned utilities, independent system operators, reliability organizations, transmission companies, non-utility generators, energy marketers, consultants, and engineering firms.

### Professional Memberships

- Board Member of RMEL/Alltricity – 2010-2020; Board President 2018-19; elected Vice President of Membership 2012-2019
- Associate Member of American Public Power Association (APPA)
- Associate Member of National Rural Electric Cooperative Association (NRECA)

### Professional Education Certification

- Public Utilities Reports - Principals of Public Utilities O&M, 11/1998
- Leadership Management Workshop 11/2004
- Principals of Power Plant Design, Permitting, Engineering & Economics 2/2006
- HR Recruiting & Hiring Training & Certification Program 7/2006
- Workforce Development 2/2007
- Utility Financing Workshop 1/2014

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## Scope of Work

### Information Gathering

Mycoff Fry Partners will visit with NCPA to obtain information regarding:

- The goals, responsibilities, and duties of the General Manager.
- The desired training, experience, talents, skills, and personal attributes of candidates.
- NCPA's current and future challenges, related operating performance and business strategies, and other organizational information including revenues, financial condition, customers, staff, resources, organizational structure, corporate culture, and values.
- Regional information such as location, population, climate, growth rate, culture, and cost of living.
- Desired compensation package.
- NCPA's policy for relocation, retirement, health, vacation, and other employee benefits.
- Available financial documents, annual reports, organizational charts, strategic and business plans, and other documents outlining goals and performance benchmarks.

### Develop a Position Profile

We will use the gathered information, in consultation with NCPA, to develop a position profile or "Search Description" that provides organization details, regional information, and describes pertinent goals, responsibilities, duties, skills, abilities, and other attributes for the General Manager. Mycoff Fry Partners can provide Search Description samples upon request. Examples of Search Description documents are available upon request or on our website with active searches at [Current Searches – Mycoff Fry Partners LLC](#).

## Conduct Recruitment Activities

After compiling the information listed under Information Gathering and confirming alignment with the hiring authority on the ideal candidate profile, we will research our database and other resources to identify potential candidates or "leads" to potential candidates. We will contact these individuals, as well as any individuals who apply directly to NCPA, to determine their suitability or to solicit suggestions of other potential prospects. Mycoff Fry Partners will also evaluate internal candidates to determine their suitability.

We may place advertisements in suitable publications to provide maximum exposure for the opening. We post all openings on our web site ([www.mfpllc.us](http://www.mfpllc.us)), which receives over 5,000 monthly visits, primarily from industry professionals. We also utilize other social networking portals, such as our LinkedIn accounts to reach a large audience. Openings posted on our social media portals often receive thousands of views. In all assignments, we actively seek a diverse candidate pool and ensure all qualified candidates receive equal opportunity for consideration.

Mycoff Fry Partners will conduct telephone interviews with qualified external candidates and all internal applicants to investigate the following:

- The degree the candidate satisfies the established hiring criteria, the candidate's fit with NCPA's culture and values, and the candidate's level of interest and motivation to become General Manager.
- The candidates' attitude toward, and feasibility of, a job change and relocation (ease of home sale, retirement plans, other potential barriers).
- The candidates' compensation requirements.

We will evaluate candidates, submit a long-list of appropriate individuals along with their credentials, and recommend a short-list of the most qualified applicants. We then facilitate applicant review and selection with the hiring authority.

## Interview of Candidates

After NCPA reviews the long-list report and resumes, and approves a short-list of prospects, we will assist NCPA's subsequent interview and selection process by:

- Scheduling and facilitating interviews (virtual or on-site), including development of interview questions, candidate evaluation materials, and guiding the hiring authority through each interview process.
- Professional reference checks.
- Guidance to NCPA through more in-depth background investigations and/or behavioral assessments of finalist(s), if requested.
- Salary, contract, and employment negotiations as requested by the hiring authority, including review and development of an offer letter and/or employment agreement, in consultation with NCPA's governing body and legal support.
- Notifying candidates of their selection or rejection.

## Candidate Evaluation Methodology

Mycoff Fry Partners strives to understand the industry, its trends, regional and local industry challenges, and performance benchmarks to enable us to evaluate candidates. We also believe past performance is the leading indicator of future performance. We developed the following **ASSESS** acronym to represent our evaluation approach:

**A**bility: Ascertain talent, aptitude, capability, wisdom, or intellect. The inherent ability to think, reason, and learn.

**S**trategy: The degree an individual can provide a vision to lead an organization to success.

**S**uccess: Does the candidate have a record that shows the capability to deliver successful results?

**E**thics: Does a candidate operate from a moral and ethical core or compass?

**S**tyle: Failure can be a result of an individual's inability to operate within an organization's culture. Ability, Strategic Vision, Success, and Ethics describe what a candidate does; Style describes how he/she accomplishes work. A compatible style between candidates and employers is crucial.

**S**ubstance: Industry knowledge. Do candidates have a comprehension of the field in which they will operate?

## Optional Behavioral Assessments

Mycoff Fry Partners enjoys a longstanding relationship with Acumen Dynamics in support of its recruitment processes. Acumen's evaluations have proven to be an outstanding tool for our clients in gaining deeper insight into finalists' behavioral characteristics, which can be helpful when comparing top prospects.

Acumen Dynamics offers proven data-driven methods, tools, and techniques to support search effectiveness and to ensure proper candidate matching, administered by a subject matter expert with a deep working knowledge of the utility sector as well as other industries. More information on Acumen Dynamics is available at: <https://acumendynamics.com/our-approach/>.

Mycoff Fry Partners can also coordinate with other behavior assessment firms, processes, or tools to accommodate NCPA's preferences.

## Fees and Expenses

Our fee is \$95,000, plus expenses. The fee is payable at \$31,000 in advance; \$31,000 when we submit the long list of candidates; and \$33,000 when the General Manager begins employment.

Reimbursable expenses, which will include a 10% mark-up for handling and carrying cost, include:

- Mycoff Fry Partners travel expenses to meet with NCPA as described under Information Gathering, if necessary, and travel expenses to attend interviews or additional meetings as requested by NCPA.

- Approved recruitment advertising expenses.
- When appropriate, Mycoff Fry Partners will facilitate reimbursement of candidate travel expenses to expedite the candidate reimbursement process. Mycoff Fry Partners will gather and approve expense reimbursement receipts, directly reimburse candidates, and conveniently invoice all candidate expenses with receipts under one invoice to NCPA.

Reimbursable expenses carry a wide estimate dependent on NCPA expectations of advertising (\$500 - \$5,000), the number of candidates involved in the interview process and their travel expenses (typically ranging from \$2,000 to \$10,000 in total), the number of visits our Managing Director is required to attend (~\$500 to \$1,500 per visit), and the potential of expenses related to finalist candidate background checks and/or associated evaluations (\$300 to \$12,000).

NCPA will incur expenses to interview finalists in Roseville, California, or other approved locations, and expenses to relocate the selected individual. Mycoff Fry Partners will incur telephone, postage, printing, and other administrative expenses.

Should NCPA choose to procure services from Acumen Dynamics to assist in finalist behavioral assessment and comparison, NCPA will contract directly with Acumen and Mycoff Fry Partners will facilitate this work. Typical fees for Acumen Dynamics's to perform a full evaluation of a finalist ranges from \$9,000 to \$11,000. Acumen also offers a-la-carte options as well as a broader range of services.

## Additional Information

### Guarantee

We will conduct an additional search for no additional fee should termination of employment occur with a candidate we recommend for any reason other than lack of work, illness, injury, or death within one year of the new hire's employment date. This includes events in which NCPA terminates the employee for reasons that are within a reasonable and legal scope of discovery during candidate investigations by Mycoff Fry Partners. In the event of a replacement search, NCPA will be responsible for travel and advertising expenses as defined above during the replacement search process.

### Timeline

Mycoff Fry Partners will develop a mutually agreed upon recruitment timeline with advice and approval from NCPA. The timeline will include dates for major milestones to ensure timely performance and enable the hiring authority and potential candidates to hold calendars for critical steps in the process. Most recruitment processes span four to six months, dependent on the hiring authority's start date preferences and the successful candidate's obligation to give notice to his/her current employer.

See attachment below for a loose representation of timeline and in consideration of NCPA's goal to have a new General Manager on-board by March of 2026. Note in this timeline the substantive time constraint with a goal of March 2026 in alignment with your anticipated approval date for the recruitment firm. The process also includes a likely collision of Christmas and New Year holiday weeks with the semi-finalist interview stage.

### Cancellation

NCPA or Mycoff Fry Partners may cancel this agreement at any time. If NCPA employs any of the candidates submitted by Mycoff Fry Partners within two years of the submittal date, NCPA will pay Mycoff Fry Partners the fee described above.

#### Indemnification

Mycoff Fry Partners is comfortable with the Indemnification statement listed in Appendix "A" of the RFP document, Section 5.2.

#### Transition Activities

Aside from counseling to the new General Manager hire, Mycoff Fry Partners will work with the NCPA team to ensure a proper coordination and planning of onboarding activities with staff and board leadership. We will also communicate with the new hire and NCPA team in years following the placement to ensure all parties are satisfied and to offer our assistance to ensure the long-term success of the recruitment.

#### Other Information

We are sensitive to candidates' need for confidentiality and will not reveal identities until an appropriate time. We take special care not to jeopardize anyone's present employment or hinder our clients' capabilities.

We adhere to all laws applicable to recruitment and employment and maintain customary insurance policies.

We will provide NCPA with weekly status reports throughout the recruitment process. We pride ourselves in a high level of communication and a "no surprises" approach with both clients and candidates.

Background checks - It is most common that our clients' human resources teams employ their standard contingency and official background check process; however, Mycoff Fry Partners can assist with conducting a third-party background check through an external party. We cannot conduct drug testing or credit checks on finalist candidate options but will work with internal parties to ensure execution when requested.

Landing Page – Our firm's SharePoint site can be a host and conduit to collect, organize, and disseminate candidate information, resumes, and completed questionnaires to NCPA representatives.

Failed Initial Search – We anticipate success and offer a strong record fostering executive recruitment exercises to meet client goals and expectations. Most recruitment failures occur when a client refuses to recognize market conditions or creates an environment where talented individuals that meet expectations of qualifications cannot be successful or are assuming too much career risk. Assuming elimination of those conditions, and in the event of a failed initial recruitment exercise, Mycoff Fry Partners will continue the recruitment exercise under the current agreement until all reasonable options are eliminated.

(approval page follows)

# Approvals



Sept 18, 2025

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Scott Fry

Date

Managing Director  
Mycoff Fry Partners LLC

---

Signature, Name, Title, and Date  
(Full Client Name)

**(TIMELINE AND REFERENCE LIST FOLLOW)**

# SAMPLE TIMELINE

## (DRAFT) NCPA General Manager - Recruitment Timeline

Projected Dates	Tasks
<b>September 29 – October 17</b>	<ul style="list-style-type: none"> <li>• 1-2 hour virtual conference call to discuss search strategy and process with the Search Committee. Finalize timeline. Q&amp;A. Identify all stakeholders for initial Information Gathering stage;</li> <li>• MFP will begin <u>scheduling</u> one-on-one calls with Search Committee members and approved staff;</li> <li>• "Food for thought" document submitted to Search Committee members in preparation for one-on-one calls.</li> <li>• All information gathering completed with NCPA team of stakeholders; includes one-on-one telephone conversations with Search Committee members and approved staff; (one hour with each Search Committee member)</li> <li>• Draft Search Description submitted to Search Committee for review;</li> <li>• Search Description approved.</li> </ul>
<b>October 20 – November 28</b>	<ul style="list-style-type: none"> <li>• MFP LLC begins advertising and candidate identification through telephone networking.</li> <li>• Networking and advertising cycle executed and completed;</li> <li>• Telephone screenings with qualified internal and external prospects completed;</li> <li>• Long-list report and resumes of top candidates submitted for review.</li> </ul>
<b>Week of December 1</b>	<ul style="list-style-type: none"> <li>• Conference call to review long-list and select semi-finalist candidates for interviews with NCPA. (2-hour virtual meeting)</li> </ul>
<b>Between Dec 15-Jan 2</b>  <b>**Note significant interference with holidays during this step**</b>	<ul style="list-style-type: none"> <li>• Semi-finalist virtual or group-virtual interviews completed (typically two partial (3/4) days if interviewing 6-8 semi-finalist candidates; 2 full days if interviewing 8+);</li> <li>• Finalist candidates selected for on-site interviews.</li> </ul>
<b>By January 16, 2026</b>	<ul style="list-style-type: none"> <li>• MFP LLC finalizes professional reference checking as necessary; information submitted to NCPA;</li> <li>• NCPA on-site interviews with finalist prospects; (1 to 1.5 days assuming 3 finalist candidates).</li> </ul>
<b>By February 2, 2026</b>	<ul style="list-style-type: none"> <li>• Negotiations completed with top candidate, start date typically established 15-30 days later.</li> </ul>
<b>March 2, 2026</b>	<ul style="list-style-type: none"> <li>• Successful candidate begins employment</li> </ul>

## REFERENCE LIST

**Northern California Power Agency (NCPA)**

Chief Financial Officer (2005)  
Assistant General Manager of Generation (2004)  
Director Legislative & Regulatory Affairs (2001)

**Contact:**

James H. Pope  
Former General Manager  
Northern California Power Agency  
(925) 699-6447  
[jpope24@comcast.net](mailto:jpope24@comcast.net)

**Missouri Public Utility Alliance**

President & CEO (2020 and 2025)

**Contact:**

Chuck Bryant  
Board Member - MPUA  
Electric Supt - Carthage Water & Electric Plant  
(417) 237-7333  
[cbryant@cwep.com](mailto:cbryant@cwep.com)

**Illinois Municipal Electric Agency**

President & CEO (On-going)

**Contact:**

Dan Cook  
Board Chair - IMEA  
Director of Light & Power  
Highland Light and Power  
[dcook@highlandil.gov](mailto:dcook@highlandil.gov)

**Mid-West Electric Consumers Association**

Executive Director (On-going)

**Contact:**

Vernell Roberts  
Former Board Chair, MECA  
Board Chair, MO River Energy Services  
GM – Detroit Lakes Public Utilities  
218) 847-7609  
[Vernell.roberts@mrenergy.com](mailto:Vernell.roberts@mrenergy.com)

**Missouri River Energy Services**

President and Chief Executive Officer (1992 & 2023)  
Chief Strategy Officer (On-going)  
Director, Member Services and Communications (2014)

**Contact:**

Vernell Roberts  
Board Chair, Missouri River Energy Services  
GM - Detroit Lakes Public Utilities  
(218) 847-7609  
[vernell.roberts@mrenergy.com](mailto:vernell.roberts@mrenergy.com)

**Sunflower Electric Power Corporation**

Vice President, Human Resources (2025)  
Vice President, Member Solutions (2025)  
Manager Planning Engineering (2016)  
Retired Senior Manager, Human Resources & Safety  
Executive Manager of Transmission (2014)  
Manager of Engr. & Env. Affairs (2007)  
Manager of Permitting & Env. Affairs (1999)  
Operations & Maintenance Manager (1999)  
Chief Engineer (1988)  
Mechanical Engineer (1996)

**Contact:**

Steve Epperson  
Chief Executive Officer  
Sunflower Electric Power Corporation  
(620) 952-1862  
[sepperson@sunflower.net](mailto:sepperson@sunflower.net)

**Kansas Electric Power Cooperative, Inc. (KEPCo)**

Chief Operating Officer (2025)

**Contact:**

Kevin Noblet  
Chief Executive Officer  
KEPCo  
(816) 686-8887  
[knoblet@kepco.org](mailto:knoblet@kepco.org)

**Electricities of North Carolina, Inc.**

Chief Executive Officer (2009 & 2015)  
Chief Financial Officer (2024)  
Manager of Regulatory Issues (2003)

**Contact:**

Roy Jones  
Chief Executive Officer  
Electricities of North Carolina, Inc.  
(919) 760-6352  
[rjones@electricities.org](mailto:rjones@electricities.org)

**Platte River Power Authority (PRPA)**

General Manager/CEO (2012 & 1999)  
Chief Technology Officer (2024)  
Chief Strategy Officer (2018 & 2022)  
Chief Transition & Integration Officer (2022)  
Chief Operating Officer (2021)  
General Counsel (2019)  
Vice President, Power Supply (2017)  
Dir Power Markets & Generation Dispatch (2014)  
Plant Manager (2015)

**Contact:**

Jason Frisbie  
GM/CEO  
Platte River Power Authority  
(970) 229-1705  
[FrisbieJ@prpa.org](mailto:FrisbieJ@prpa.org)  
  
Libby Clark  
Director Human Resources & Safety  
Platte River Power Authority  
(970) 229-5603  
[clarkl@prpa.org](mailto:clarkl@prpa.org)

**PNGC Power**

President & CEO (2019 and 2024)

**Contacts:**

Mark Johnson  
Board Member and Search Committee Chair  
CEO - Flathead Electric Coop  
(406) 471-1813  
[M.Johnson@flathead.coop](mailto:M.Johnson@flathead.coop)

**Southern Minnesota Municipal Power Agency**

Executive Director/CEO (1998 & 2011)  
Chief Operating Officer (2011 and 2024)  
Dir, Government & Agency Relations (2015)  
Chief Financial Officer (2007)

**Contact:**

David Geschwind  
Executive Director & CEO  
Southern Minnesota Municipal Power Agency  
(507) 285-0478  
[dp.geschwind@smmpa.org](mailto:dp.geschwind@smmpa.org)

**American Municipal Power, Inc. (AMP)**

Chief Financial Officer (2022)  
SVP, Transmission Planning & Development (2024)

**Contact:**

Jolene Thompson  
President & CEO  
AMP  
(614) 337-6222  
[jthompson@amppartners.org](mailto:jthompson@amppartners.org)

**Basin Electric Power Cooperative**

Chief Operating Officer (2022)  
Chief Financial Officer (2022)

**Contact:**

Todd Telesz  
Former Chief Executive Officer  
Basin Electric Power Cooperative  
(720) 253-5144  
[ttelesz@comcast.net](mailto:ttelesz@comcast.net)

**Municipal Electric Authority of Georgia (MEAG)**

President & CEO (2015)  
Senior Vice President & CFO (2016 & 2022)

**Contact**

Patrick Bowie  
MEAG Board Personnel Committee Chairman  
Utility Director  
City of LaGrange, GA  
[pbowie@lagrange.net](mailto:pbowie@lagrange.net)  
(706) 302-6437

**Oglethorpe Power Corporation**

Chief Executive Officer (2024)  
Chief Operating Officer (2022)  
Senior Vice President Plant Operations (2022)

**Contact:**

Jami Reusch  
Vice President, Human Resources  
Oglethorpe Power Corp.  
(770) 270-7437  
[jami.reusch@opc.com](mailto:jami.reusch@opc.com)

**Kansas Power Pool (KPP)**

Chief Executive Officer (2012 & 2022)

**Contact:**

Gus Collins  
Board Chair - KPP  
Utilities Director  
City of Winfield, KS  
(316) 323-2903  
[gcollins@winfieldks.org](mailto:gcollins@winfieldks.org)

**Nebraska Public Power District (NPPD)**

President & CEO (2002, 1995 & 1989)  
Chief Financial Officer (2021)  
Vice President of Nuclear (2003)  
Vice President of Marketing (1997)  
Vice President Human Resources & Corp Services (2021)  
General Counsel (1995), Asst General Counsel (2009)  
Chief Information Officer (2001)  
Plant Manager (2006 & 2002)  
Manager; became VP, Human Resources (1998)  
Manager of Rates and Pricing (1998)  
Fossil Engineering Manager (2000)  
Resource Planning Manager (1997)  
Supply Chain Manager (2005)  
Telecomm. Engineering Supervisor (1998 & 2004)  
Station Chemist (2004 & 2003)

**Contacts:**

Thomas J. Kent  
President & CEO  
President  
Nebraska Public Power District  
(402) 563-5575  
[tjkent@nppd.com](mailto:tjkent@nppd.com)

**Austin Energy**

General Manager (1999, 2010, 2016, On-Going)  
Chief Operating Officer (2018 & 2021)  
Chief Financial Officer (2014)  
Vice President, Energy Service Field Operations (2019)  
Vice President, Distributed Energy Services (2013)  
Vice President, Power Delivery (2000 & 1997)  
Vice President, Power Supply (1996)

**Contact:**

Jacqueline Sargent  
Former General Manager  
Austin Energy  
(512) 322-6002  
[jsargent7516@gmail.com](mailto:jsargent7516@gmail.com)

**Northeast Energy Efficiency Partnerships (NEEP)**

Executive Director (2021)

**Contact:**

Scott Johnstone  
Board Chair  
NEEP  
(800) 639-6069x1149  
[sjohnstone@veci.org](mailto:sjohnstone@veci.org)

**Omaha Public Power District (OPPD)**

President & CEO (2015)  
Chief Financial Officer (2008, 2017, & 2021)  
Division Manager - Corp Plng & Analysis (2015)  
Manager of Pricing Services (2016)  
Division Manager Energy Marketing & Trading (2013)  
Division Manager of Human Resources (2011)  
Nuclear Design Manager (2008)  
Director of Fuels (2007)

**Contact:**

Javier Fernandez  
President & CEO  
Omaha Public Power District  
(402) 636-3223  
[lfernandez@oppd.com](mailto:lfernandez@oppd.com)

**Modesto Irrigation District (MID)**

General Manager (2016 &amp; 2020)

**Contact:**

Paul Campbell  
MID Chairman of the Board  
(209) 614 5301  
[paul.campbell@mid.org](mailto:paul.campbell@mid.org)

**Orlando Utilities Commission (OUC)**

Chief Executive Officer (2018)  
Chief Employee Experience Officer (2018)  
Chief Transformation & Technology Officer (2020)

**Contact:**

Gregory Lee  
Former Board President of OUC  
Partner at BakerHostetler, LLP  
(407) 649-4096  
[glee@bakerlaw.com](mailto:glee@bakerlaw.com)

**Florida Municipal Power Agency (FMPA)**

General Manager & CEO (2016)  
Chief Operating Officer (2019)  
Executive Director, Florida Municipal Power Pool (2020)

**Contact**

Bill Conrad  
Chair of the FMPA Board  
Mayor of Newberry, FL  
(352) 472-9273  
[Bill.conrad@ci.newberry.fl.us](mailto:Bill.conrad@ci.newberry.fl.us)

Jacob Williams  
General Manager & CEO  
Florida Municipal Power Agency  
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**Connecticut Municipal Elec. Energy Coop.**

Chief Executive Officer (2010 & 2019)

**Contact:**

Ken Sullivan  
CMEEC Chairman of the Board  
Director of Utilities  
Jewett City Department of Public Utilities  
(860) 376-2955  
[ksullivan@jewettcitydpu.com](mailto:ksullivan@jewettcitydpu.com)

**Energy Northwest**

Chief Executive Officer (2010 & 2018)

**Contact:**

Sid W. Morrison  
Chairman of the Executive Board  
Energy Northwest  
(360) 481-7105  
[MrSidWMorrison@aol.com](mailto:MrSidWMorrison@aol.com)

**Central Nebraska Public Power & Irrigation District**

General Manager (2018)

**Contact:**

Dudley Nelson  
Chairman of the Board  
Central Nebraska Public Power & Irrigation District  
(308) 830-0300  
[dud@rcom-ne.com](mailto:dud@rcom-ne.com)

**Northwest Power Pool**

President (2018)

**Contact:**

Hardev Juj  
Board Chair in 2018  
Northwest Power Pool  
(253) 576-8673  
[hardev.juj@gmail.com](mailto:hardev.juj@gmail.com)

**Kentucky Municipal Energy Agency**

Chief Executive Officer (2018)

**Contact:**

Brown Thornton  
Consultant with KyMEA  
NewGen Strategies & Solutions  
(615) 714-7896  
[thorntonbd@gmail.com](mailto:thorntonbd@gmail.com)

**Huntsville Utilities (AL)**

Chief Operating Officer (2023)  
Chief Executive Officer (2017)  
Chief Financial Officer (2011)

**Contact:**

Wes Kelley  
CEO  
Huntsville Utilities  
(256) 929-9813  
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**Southern California Public Power Authority**

Executive Director (2000 & 2017)  
CFO (2015)  
Director Resource & Program Development (2014)  
Senior Project Manager (2014)

**Contact:**

Mike Webster  
Executive Director  
Southern CA Public Power Authority  
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**City of Palo Alto Utilities**

Director of Utilities (2006 & 2016)

**Contact:**

Ed Shikada  
Palo Alto Assistant City Manager  
650-329-2146  
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**Kansas Municipal Energy Agency**

General Manager (2015)

**Contact:**

Paul Mahlberg  
General Manager & CEO  
KMEA  
[mahlberg@kmea.com](mailto:mahlberg@kmea.com)  
(816) 564-9558

**Northwest Power and Conservation Council**

Power Delivery Director (2012)

**Contact:**

Stephen Crow  
Executive Director  
Northwest Power and Conservation Council  
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[scrow@nwcouncil.org](mailto:scrow@nwcouncil.org)

**Northwest Energy Efficiency Alliance (NEEA)**

Chief Executive Officer (2012 & 2008)

**Contact:**

Jim West  
Prior Board Director  
Northeast Energy Efficiency Alliance  
Retired Chief Customer Officer  
Memphis Light, Gas & Water  
(425) 698-3812  
[jamesnwest@gmail.com](mailto:jamesnwest@gmail.com)

**Texas Municipal Power Agency (TMPA)**

General Manager (2012)  
Chief Financial Officer (2008)  
Plant Manager (2002)  
Transmission Manager (2007)  
Engineering & Planning Supt (2012)

**Contact:**

Bob Kahn  
Former GM, TMPA  
General Manager, Austin Energy  
(512) 694-9867

**Washington Public Utility Districts Association**

Executive Director (2011)

**Contact:**

Jeff Hall  
Board Chairman  
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[JH7195@gmail.com](mailto:JH7195@gmail.com)

**California Municipal Utility Association**

Executive Director (2009)

**Contact:**

Ron Davis  
Former Chairman of the Board CMUA  
Former General Manager  
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**American Public Power Association**

President & Chief Executive Officer (2007)

**Contact:**

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Past President, APPA  
(417) 838-8576  
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**City of Anaheim, CA Dept. of Water & Power**

General Manager/CEO (2000 & 1990)  
Asst. General Manager of Electric Services (2006)  
Asst. General Manager of Finance &  
Administration/CFO (2001)  
Asst. General Manager of Water Services (1997)  
Finance & Accounting Manager/Controller (2007)

**Contact:**

Marcie Edwards  
Former General Manager  
Anaheim Public Utilities  
Former CEO,  
Los Angeles Department of Water & Power  
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# EXECUTIVE RECRUITMENT SERVICE PROVIDERS

## NCPA-General-Manager-RFP-08182025

### Request for Proposal (RFP) Response

SBA 8(a) Certified – Expires September 30, 2026 SBA Case Number: C0069X  
SBA HUBZone Certified

GSA MAS Contract: GS-35F-521BA  
GSA STARS III Contract: 47QTCB21D0397

**Submitted By:**

**POC 1:** Mohamed Aitboulahsen  
**Title:** Proposal Manager  
**Email:** mboulahsen@E-LOGIC.US

**Authorized Company Representative:**

**POC 2:** Luis Padilla  
**Title:** President CEO  
**Email:** Lpadilla@E-LOGIC.US  
**Phone:** +1 (202) 499-7837

**E-Logic, Inc.**  
**Physical Address:** 2000 Pennsylvania  
Avenue NW, STE 7000, Washington DC  
20006.

**SAM UEI:** G8SNQ1CZGNX5  
**DUNS:** 786965876  
**CAGE Code:** 4QTF4  
**TIN/EIN:** 51-0629765

**Date:** Sep 18, 2025

The terms and conditions contained in the RFP are acceptable to be included in the award document without modification, deletion or addition. We agree to hold the prices in this quotation for 90 calendar days from the date specified for receipt of proposals. We Agree with all terms, conditions, and provisions included in the solicitation. We agree to furnish any or all items upon which prices are offered at the price set opposite each item.

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## **Executive Summary**

E-Logic, Inc. is honored to present this proposal in response to the Northern California Power Agency's (NCPA) Request for Proposals for Executive Recruitment Services to support the selection of NCPA's next General Manager. As a trusted federal contractor with a strong reputation for delivering professional services, staffing, and program management solutions, we recognize the importance of this engagement to NCPA's long-term strategic direction. The General Manager role is central to ensuring NCPA continues to advance its mission of providing reliable, affordable, and clean energy to its members while leading the Agency through an evolving energy landscape.

E-Logic brings to this assignment a unique combination of certified small business agility, recruitment and staffing expertise, program management discipline, and a deep understanding of organizational governance and compliance frameworks. Our proven track record of supporting federal agencies with staffing, program oversight, and specialized personnel recruitment enables us to design and execute a process that will attract, assess, and deliver highly qualified executive candidates who are aligned with NCPA's vision and priorities.

## **Proposal Highlights**

### **1. Comprehensive Recruitment Methodology**

E-Logic employs a structured, phased methodology to ensure a robust and transparent executive recruitment process. Our approach begins with close collaboration with NCPA's Executive Committee and Commission to refine the position profile and define the leadership qualities required of the next General Manager. We then launch a national search strategy that combines targeted outreach, industry networking, and proactive engagement with both active and passive candidates from the utility, public power, and energy sectors.

We incorporate rigorous screening, multi-level interviews, and behavioral assessments to ensure each candidate not only meets the technical and managerial requirements but also demonstrates the leadership, integrity, and vision necessary to guide NCPA into the future. Our process concludes with comprehensive background checks, reference validation, and negotiation support to facilitate a smooth transition into the role.

### **2. Experienced and Dedicated Project Leadership**

Our proposed Project Manager, Ms. Lisbeth Sarabia, will serve as the primary lead for this engagement. Ms. Sarabia is a highly skilled Project Manager with significant experience overseeing professional services and staffing support for complex federal government programs. She has successfully managed teams, resources, and compliance requirements to deliver projects on time and within budget while maintaining alignment with client goals and federal standards such as the Federal Acquisition Regulation (FAR). Her role will be to ensure clear communication, quality assurance, and accountability at every stage of the recruitment process.

### **3. Commitment to Diversity, Transparency, and Retention**

We understand that NCPA's commitment to excellence includes building a leadership team that reflects diverse perspectives and experiences. E-Logic actively promotes inclusivity in its recruitment strategies, ensuring outreach is broad and equitable. We also recognize the importance of candidate retention. Our process goes beyond identifying a candidate—it ensures alignment between NCPA's culture, governance, and strategic goals with the executive's vision and values, thereby supporting long-term success.

#### **4. Proven Past Performance in Recruitment and Staffing Support**

E-Logic has successfully delivered staffing, technical personnel, and program support services to multiple federal agencies, including the U.S. Army, the U.S. Census Bureau, and the Selective Service System. Our experience includes sourcing, vetting, and managing highly qualified professionals for mission-critical programs under strict compliance and security requirements. These engagements highlight our ability to identify and manage specialized talent with precision, a capability we will apply directly to NCPA's executive search.

#### **5. Certified Small Business Advantage**

As a Small Business, SBA 8(a) participant, and SBA HUBZone-certified contractor, E-Logic brings the advantage of cost-effectiveness, flexibility, and personalized service. We are also eligible for sole-source contracts, demonstrating the federal government's recognition of our strong capabilities. Our DCAA-approved accounting system and Secret facility clearance further underscore our reliability and compliance with rigorous standards.

### **Proposer Information**

#### **Legal Name and Address of Proposer**

- E-Logic, Inc.
- 2000 Pennsylvania Avenue NW, Suite 7000 Washington, D.C. 20006

#### **Legal Form of Proposer**

- Corporation (Small Business; SBA 8(a) certified, SBA HUBZone certified)

#### **Office(s) Involved in Providing Services**

- Headquarters: Washington, D.C. 2000 Pennsylvania Avenue NW, Suite 7000 Washington, D.C. 20006

#### **Point of Contact Concerning the Proposal**

- **Luis F. Padilla, President & CEO**
- 2000 Pennsylvania Avenue NW, Suite 7000 Washington, D.C. 20006
- Phone: 202-499-7837 | Email: LPadilla@e-logic.us

#### **Proposed Lead Staff for Providing Services**

- **Lisbeth Sarabia, Project Manager**
- 2000 Pennsylvania Avenue NW, Suite 7000 Washington, D.C. 20006

- Phone: 202-448-9695 | Email: LSarabia@e-logic.us

## Conclusion

E-Logic is confident in our ability to deliver a comprehensive, results-driven executive recruitment process that will enable NCPA to identify, attract, and retain a highly qualified General Manager by the first quarter of 2026. Our structured methodology, experienced project leadership, and proven record of staffing success uniquely position us to serve as NCPA's trusted partner in this critical endeavor.

We look forward to the opportunity to collaborate with the NCPA Executive Committee and Commission in securing a leader who will ensure continued organizational success and provide strategic direction for years to come.

## Proposer's Qualifications

E-Logic, Inc. is a trusted SBA 8(a) and HUBZone-certified small business with nearly two decades of experience delivering professional staffing, executive-level support, and program management services to federal agencies and public organizations. Our qualifications demonstrate both the technical expertise and organizational maturity to guide NCPA through a strategic, inclusive, and highly professional executive recruitment process for its next General Manager.

Our approach is methodical, collaborative, and results-driven. It combines extensive experience in personnel recruitment, project management, and compliance oversight with proven capabilities in candidate evaluation, background vetting, and negotiation support. The following subsections demonstrate how E-Logic will address each requirement of the solicitation.

### 1. Developing a Comprehensive Candidate Profile

E-Logic will begin the recruitment engagement with structured consultation sessions with the Executive Committee, Commission, and other designated stakeholders. Through facilitated discussions, we will capture NCPA's strategic goals, organizational culture, and the specific leadership competencies required for success.

- **Tailored Leadership Criteria:** We will translate NCPA's needs into a clear profile outlining the technical skills, industry knowledge, and leadership qualities expected in the next General Manager.
- **Competency Framework:** Using proven models such as PMBOK-aligned project management principles and behavioral leadership frameworks, we will identify both technical and soft skills required for effective organizational leadership.
- **Benchmarking:** We will benchmark the role against executive leadership positions at comparable public power agencies and utilities to ensure market alignment.

This process ensures the profile is comprehensive, objective, and directly aligned with NCPA's mission and long-term strategy.

## 2. Recommending Revisions to the General Manager Job Description

If requested, E-Logic will work with the Executive Committee to modernize and refine the General Manager job description to ensure accuracy, inclusivity, and competitiveness.

- We will **update role requirements** to reflect evolving challenges in energy markets, regulatory compliance, stakeholder engagement, and clean energy transition.
- We will **ensure alignment with industry standards** and incorporate best practices from recent executive searches.
- We will emphasize **diversity, equity, and inclusion (DEI)** language to encourage applications from a broader, more representative candidate pool.

Our goal is to position the General Manager role as both strategically compelling and market competitive, attracting the highest caliber of candidates.

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## 3. Designing and Implementing an Effective Recruitment Strategy

E-Logic's recruitment strategy combines proven outreach techniques, innovative sourcing tools, and targeted engagement to deliver a diverse, highly qualified candidate pool.

- **Multi-Channel Outreach:** Leverage national industry associations (e.g., APPA, NRECA), professional networks, online executive search platforms, and direct outreach campaigns.
- **Active and Passive Candidate Engagement:** We will proactively identify and engage candidates not actively seeking new opportunities but who possess the unique qualifications required.
- **Inclusive Recruitment:** Our approach ensures equity in outreach, targeting underrepresented groups to strengthen NCPA's commitment to diversity.
- **Confidentiality and Discretion:** We implement secure communication channels to protect candidate privacy and ensure process integrity.

This strategy ensures a broad, competitive pool of candidates and maximizes the likelihood of identifying a transformative leader for NCPA.

## 4. Screening, Narrowing, and Candidate Reporting

E-Logic will employ a rigorous, multi-stage screening process to ensure only the best candidates advance:

- **Stage 1: Application Review** – Preliminary vetting against established candidate profile.

- **Stage 2: Structured Interviews** – Behavioral and competency-based interviews conducted by our project team.
- **Stage 3: Executive Committee Alignment** – Presentation of top candidates with detailed profiles, résumés, interview summaries, and initial reference checks.

Each candidate package will include:

- Professional background and work history.
- Education and certifications.
- Leadership and management achievements.
- References and initial evaluation ratings.

This process provides the Executive Committee with transparent, data-driven insights into candidate qualifications and suitability.

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## 5. Assisting in the Interview and Selection Process

E-Logic will guide the Executive Committee through structured, equitable, and effective interviews.

- **Interview Design:** We will develop structured interview questions tailored to the GM position profile.
- **Facilitation:** Provide interview coordination, scheduling, and logistics support.
- **Evaluation Tools:** Develop standardized scoring rubrics to promote objectivity and consistency across interviews.
- **Advisory Role:** Act as an impartial advisor during deliberations, ensuring all candidates are considered fairly.

By providing professional facilitation, we ensure the selection process is efficient, transparent, and aligned with NCPA's governance standards.

## 6. Independent Evaluation and Assessment

Our team will deliver objective, third-party assessments to support the Executive Committee's decision-making.

- **Comparative Analysis:** Provide side-by-side candidate evaluation matrices based on weighted criteria.
- **Behavioral and Leadership Assessment:** Apply assessment tools to evaluate management style, problem-solving approach, and cultural alignment.

- **Risk Mitigation:** Identify potential gaps or risks associated with each candidate, ensuring informed decisions.

This independent perspective enables the Committee to make a confident, well-supported choice.

## 7. Background Checks and Negotiation Support

E-Logic will assist in completing legally compliant and comprehensive background checks on the finalist candidate(s), ensuring the process aligns with applicable federal, state, and local laws.

- **Background Verification:** Employment history, academic credentials, professional licenses, financial integrity, and legal checks.
- **Reference Validation:** Direct outreach to former supervisors, peers, and board members.
- **Compensation Negotiation Support:** Provide benchmarking data on utility and public power executive compensation, and assist in structuring an attractive, competitive offer package.

We ensure that once the ideal candidate is selected, the process concludes with a smooth, compliant negotiation and onboarding transition.

## Depth of Capabilities and Support

E-Logic's qualifications are reinforced by:

- **Dedicated Project Manager:** Ms. Lisbeth Sarabia, providing hands-on leadership, communication, and quality oversight.
- **Proven Past Performance:** Demonstrated ability to staff, recruit, and manage specialized personnel for high-stakes federal programs.
- **Certified Small Business Agility:** As an SBA 8(a) and HUBZone firm, we offer responsive, cost-effective, and flexible solutions.
- **Compliance Infrastructure:** DCAA-approved accounting system, facility clearance, and adherence to FAR, ensuring accountability and transparency.

## Conclusion

E-Logic Inc. possesses the qualifications, experience, and depth of capability to conduct a successful executive recruitment for NCPA's General Manager position. Our strategy is designed to deliver a diverse, highly qualified candidate pool, supported by rigorous evaluation, transparent reporting, and compliance-driven processes. Most importantly, we offer NCPA a trusted partner who will provide consistent, reliable support until the successful onboarding of the selected candidate.

## **Proposed Approach & Methodology**

E-Logic, Inc. will deliver Executive Recruitment Services for NCPA's General Manager search through a phased, milestone-driven methodology that aligns directly with the compensation schedule. This approach ensures transparency, measurable progress, and direct linkage between completed deliverables and payments.

### **Phase 1 – Project Initiation (Engagement, Profile Development, Outreach Plan)**

**Objective:** Establish the foundation for a successful recruitment by aligning with NCPA's Executive Committee on expectations, leadership requirements, and outreach strategy.

#### **Key Tasks:**

- Conduct kickoff meeting with the Executive Committee.
- Interview stakeholders (Commissioners, senior staff) to define leadership criteria and cultural fit.
- Draft a comprehensive Candidate Profile capturing the ideal qualifications, competencies, and attributes.
- Review and recommend revisions to the General Manager job description (if requested).
- Develop and finalize a national outreach and recruitment plan, incorporating both active and passive candidate sourcing, targeted industry outreach, and DEI-focused strategies.

**Deliverable:** Candidate Profile, Final Job Description (if revised), and Outreach Plan.

### **Phase 2 – Candidate Shortlist (At Least 10 Candidate Profiles with Preliminary References)**

**Objective:** Identify, screen, and present a pool of highly qualified, diverse candidates who align with NCPA's needs.

#### **Key Tasks:**

- Manage candidate applications through a secure, confidential system.
- Conduct initial reviews to confirm alignment with Candidate Profile.
- Perform structured behavioral interviews to evaluate leadership style and technical expertise.
- Develop an Assessment Matrix comparing candidate qualifications against weighted criteria.
- Conduct preliminary reference checks on top candidates.

- Present at least ten candidate profiles, each including résumé, background summary, and preliminary evaluation.

**Deliverable:** Shortlist of 10+ qualified candidates with preliminary reference checks and detailed profiles.

### **Phase 3 – Final Selection (Interviews, Comprehensive References, Negotiation Support)**

**Objective:** Support NCPA through interviews, final vetting, selection, and negotiation of the chosen General Manager candidate.

#### **Key Tasks:**

- Develop structured interview guides and scoring rubrics.
- Coordinate logistics for Executive Committee interviews.
- Provide independent evaluations and comparative analyses of finalists.
- Conduct comprehensive reference checks and legally compliant background investigations.
- Assist with benchmarking compensation, preparing negotiation strategy, and supporting employment agreement discussions.
- Advise on onboarding and transition planning for the selected candidate.

**Deliverable:** Final candidate evaluation package, interview support materials, reference/background reports, and negotiation support.

### **Ongoing Project Management**

**Objective:** Provide continuous oversight, communication, and quality assurance throughout the recruitment process.

#### **Key Tasks:**

- Weekly progress updates to the Executive Committee.
- Risk management, schedule monitoring, and issue resolution.
- Maintain confidentiality and compliance with NCPA's standards.
- Quality assurance across all phases to ensure accuracy, equity, and transparency..

### **Conclusion**

By structuring our methodology around clearly defined phases and deliverables, E-Logic ensures that NCPA receives tangible results at every stage of the engagement. This phased approach provides accountability, transparency, and confidence that NCPA's next General

Manager will be identified, vetted, and onboarded through a rigorous, professional, and inclusive process.

### **Individual Qualifications**

E-Logic, Inc. proposes Ms. Lisbeth Sarabia, MBA, to serve as the Project Manager and lead staff person responsible for delivering the Executive Recruitment Services. Ms. Sarabia will be the primary point of contact for NCPA, overseeing all phases of the engagement, ensuring clear communication with the Executive Committee, and managing the recruitment process from initiation through onboarding.

### **Lisbeth Sarabia, Project Manager**

#### **Education & Certifications**

- MBA – La Salle University (2020–2021)
- Strategic Sales – Anahuac University (2019–2020)
- Financial Engineer – University of San Simon (2013–2016)

#### **Relevant Experience**

Ms. Sarabia brings over seven years of progressive experience in program management, professional services delivery, and personnel oversight for federal government contracts. Her background includes managing diverse teams, negotiating with vendors and stakeholders, and ensuring compliance with strict regulatory and contractual requirements, including the Federal Acquisition Regulation (FAR).

- **Executive-Level Staffing and Recruitment Support:** As Project Manager at E-Logic, Ms. Sarabia has overseen multiple professional services and staffing projects, ensuring the timely recruitment, vetting, and placement of skilled personnel for sensitive government assignments. She has developed and executed structured staffing plans, coordinated recruitment logistics, and ensured candidate readiness for mission-critical roles.
- **Public Agency and Utility-Related Program Support:** Through her leadership of IT, logistics, and professional services contracts, Ms. Sarabia has supported projects directly serving public agencies and federally regulated environments. This experience equips her with the ability to understand governance structures similar to NCPA's and tailor recruitment processes to the expectations of publicly accountable entities.
- **Candidate Evaluation and Negotiation:** She has successfully led structured interview processes, performance assessments, and contract negotiations with personnel and vendors, ensuring that recruited staff met both technical qualifications and organizational cultural fit.

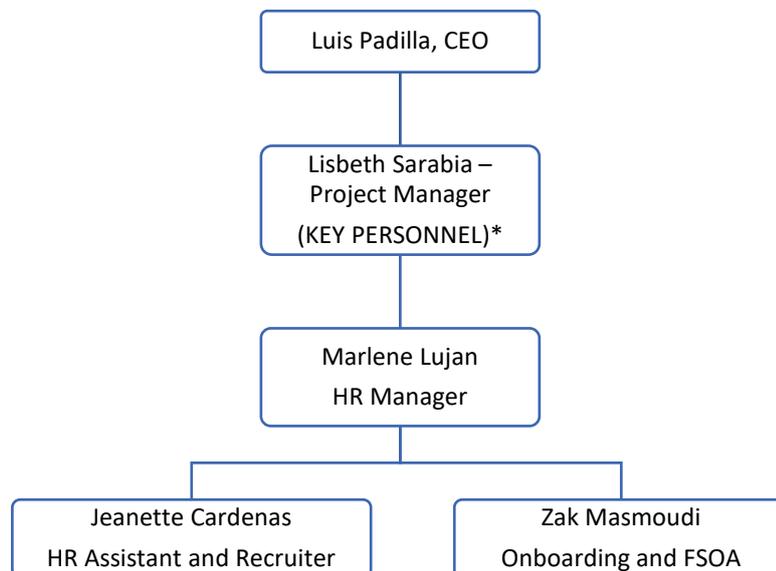
- **Risk and Quality Management:** Drawing on PMBOK standards, Ms. Sarabia applies structured project management methods to mitigate risks, monitor performance, and maintain quality standards across recruitment and staffing efforts.

### Strengths for NCPA’s Recruitment:

- **Direct Oversight:** Will provide hands-on leadership, ensuring that all phases of the recruitment process—from candidate profiling to background checks—are managed with professionalism and transparency.
- **Diversity and Inclusion Focus:** Experienced in creating fair and competitive recruitment strategies that emphasize inclusivity, ensuring a broad and representative candidate pool.
- **Utility and Public Agency Awareness:** While her portfolio includes federal and civilian programs, Ms. Sarabia’s experience with compliance-driven, publicly accountable organizations directly translates to the governance and transparency requirements of recruiting an executive for NCPA.

### Supporting Team

While Ms. Sarabia will serve as the lead, she will be supported by **E-Logic’s internal project support staff**. These personnel will provide logistical and technical assistance in screening, background checks, and reporting, ensuring efficiency and accuracy throughout the engagement.



*\*Key Personnel Resume in Appendix A*

### Conclusion

Ms. Sarabia’s qualifications demonstrate a strong alignment with NCPA’s requirements for executive recruitment services. With her experience managing complex staffing initiatives for government agencies, her leadership in professional services delivery, and her ability to apply structured project management practices, Ms. Sarabia is uniquely positioned to lead NCPA’s General Manager search. She will ensure that NCPA receives a transparent, inclusive, and rigorous recruitment process that delivers a highly qualified leader ready to guide the Agency into the future.

### Relevant Experience

E-Logic brings a strong record of delivering recruitment and staffing solutions for complex and sensitive government positions. While much of our past work has been in highly regulated and mission-critical environments, the skills directly transfer to executive recruitment: precision sourcing, rigorous vetting, stakeholder engagement, and seamless candidate placement.

### Representative Projects

- Joint Personal Property Shipping Office Mid Atlantic (JPPSO-MA), U.S. Army (2023)**  
 Managed personnel and logistics across an 8-state region. Staffed and supervised project managers, logisticians, and support staff under a Firm Fixed Price contract. This experience highlights our ability to manage large-scale, people-centered operations requiring strict compliance and high accountability.
- Selective Service System (2016–2017)** Provided IT and program support staff for the Registration, Verification, and Compliance system. Responsibilities included recruitment of highly specialized technical experts, security-cleared personnel, and ongoing workforce support in a mission-critical environment.
- U.S. Census Bureau (2015–2021)** As a subcontractor, provided senior PL/SQL developers and technical staff to support large-scale data management and testing initiatives. Demonstrated ability to identify and place qualified specialists under stringent requirements.

### References

#### Reference 1.

<b>Customer Name</b>	Joint Personal Property Shipping Office Mid Atlantic (JPPSO-MA)
<b>Contract Number</b>	W91QV123D0004
<b>Customer Point of Contact</b>	Mr. Darren Addison, Branch Chief Shipment Distribution (Outbound) 10109 Gridley Rd Bldg 314 1-800-521-9959 <a href="mailto:darren.r.addison.civ@army.mil">darren.r.addison.civ@army.mil</a>
<b>Contract Ceiling Award</b>	<b>\$309,960.00</b>
<b>Period of Performance</b>	1/1/2023 – 12/31/2023
<b>Contract Name</b>	Schedule I Outbound Area 2 MD/DC

<b>Type of Contract</b>	<b>Firm Fixed Price (FFP)</b>
<p>The Joint Personal Property Shipping Office Mid Atlantic (JPPSO-MA) is responsible for managing and overseeing the moving services of household goods, unaccompanied baggage, and non-temporary storage shipments for military and Department of Defense personnel across multiple military installations. With an extensive Area of Responsibility (AOR) covering 8 states, the District of Columbia, and processing over 65,000 personal property shipments annually, the JPPSO-MA handles a significant volume of direct procurement method (DPM) shipments, approximately 18,333 shipments.</p> <p>As the provider of containerization and local drayage services for DPM personal property shipments within the JPPSO-MA AOR, E-Logic is fully equipped to deliver all necessary resources, including personnel, equipment, supplies, facilities, and transportation. Our responsibilities encompass Schedule I Outbound Pick-up services, Schedule II Inbound delivery services, and Schedule III Local delivery services for the District of Columbia, Northern Virginia, Maryland, and West Virginia.</p> <p>To effectively support this contract, E-Logic has provided a range of skilled labor categories, including Project Managers, Truck Drivers, Laborers, Warehouse Specialists, and Logisticians. Our experienced team is well-versed in the tasks outlined in the contract, ensuring seamless execution and exceptional service delivery.</p> <p><b>Task 1 - Pre-move Survey:</b> E-Logic conducts thorough pre-move surveys to determine the nature of personal property offered for shipment. This can be done through physical or telephone surveys, with the survey appointment scheduled at a mutually agreed-upon time between our contractor and the member/employee.</p> <p><b>Task 2 - Weighing:</b> We place significant emphasis on accurate weighing of shipments, ensuring the correct gross, tare, and net weight determinations. Utilizing state-certified scales in accordance with regulations, E-Logic submits weight tickets reflecting gross, tare, and net weight, accompanied by proper certifications, to the ordering officer.</p> <p><b>Task 3 - Preparation, Packing, Loading, and Containerization:</b> Our team excels in preparing, packing, loading, and containerizing personal property shipments destined for CONUS or OCONUS locations. We adhere to the highest standards of packaging, aiming to minimize cubic measurement while ensuring packages can withstand normal movement without damage. Our priority is to protect all shipments from the elements and potential theft.</p> <p><b>Task 4 - Tagging, Inventorying, and Packing List:</b> E-Logic, in close coordination with the member or employee, prepares accurate and legible descriptive inventories for household goods and unaccompanied baggage. We carefully count and examine all goods tendered for shipment, providing written exceptions for any items not in apparent good order. Proper tagging and inventorying are completed prior to the removal of goods from the residence.</p> <p><b>Task 5 - Outbound Documentation and Movement:</b> We meticulously handle all outbound documentation, adhering to the outlined procedures in the Performance Work Statement (PWS). Pickup of PPGBL/BL (property pass, Government bill of lading) and similar documents for outbound HHG shipments occurs daily, either through direct pickup from the ordering officer or as per locally established procedures such as mail or courier. Distribution of completed documents is carried out in accordance with the PWS requirements.</p> <p><b>Task 6 - Storage:</b> E-Logic ensures that all outbound shipments are appropriately identified with the member's or employee's name, PPGBL/BL number, and call or lot number. These identification markings are clearly visible on each lot. Additionally, we store personal property in a manner that maintains a minimum of two inches of clearance from the floor to the undermost portion of the items, ensuring adequate protection and accessibility.</p>	

With our proven experience and meticulous attention to detail, E-Logic is well-prepared to fulfill the requirements of this contract and provide efficient, reliable, and secure containerization and drayage services for DPM personal property shipments within the JPPSO-MA AOR.

**Reference 2.**

<b>Customer Name</b>	<b>U.S. Army – Selective Service System, Inc.</b>
<b>Contract Number</b>	<b>GSA – GS-35F-521BA - Task Order: 20160772</b>
<b>Customer Point of Contact</b>	<b>Renee Miller, Contracting Officer Representative</b> <b>703-605-4130</b> <a href="mailto:RMiller@sss.gov">RMiller@sss.gov</a>
<b>Contract Ceiling Award</b>	<b>\$396,864.00</b>
<b>Type of Contract</b>	<b>Task Order – Fixed Fee Price (FFP)</b>
<b>Period of Performance</b>	<b>10/11/2016 – 12/12/2017</b>

The Selective Services System (SSS) plays a critical role in registering young men for a potential military draft, and to support this essential function, the Agency operates the Registration, Verification and Compliance (RCV) system. Recognizing the importance of ensuring the system's efficiency, the Agency engaged the expertise of E-Logic to provide comprehensive support in coding, analysis, and testing for the RCV system. As the service provider, E-Logic successfully managed the delivery of services and engineering support to fulfill the contract requirements and assigned tasks.

Task 1 – Application Maintenance: E-Logic excelled in implementing software change requests by undertaking a thorough requirements engineering process, which encompassed activities such as elicitation analysis, specification, and validation. E-Logic took responsibility for modeling, interface definitions, and other design representations, using a range of programming languages including C#, VB.Net, T-SQL, C++, and Delphi. Furthermore, E-Logic leveraged cutting-edge technologies such as ASP.NET, Web Services, LINQ, and HTML5 to develop the necessary components identified during software design. Rigorous testing procedures were conducted to ensure the quality and functionality of the system.

Task 2 - System Testing and Training: E-Logic played a crucial role in facilitating knowledge transfer to SSS personnel during performance application system testing. By providing technical information, test cases, and adeptly resolving issues and incidents, E-Logic supported the smooth execution of application acceptance testing. In addition, E-Logic actively participated in addressing and rectifying identified defects in the software work products, thereby ensuring a highly reliable and efficient system.

Task 3 – Database Management: E-Logic demonstrated its expertise in supporting and administering MS SQL databases on the SSS LAN. The team skillfully maintained and supported the database design, structure, and interconnectivity to existing and new applications. E-Logic adeptly managed user access and permissions, guaranteeing data

integrity and reliability of the SQL services. Furthermore, E-Logic efficiently handled SQL reporting and analysis services to generate necessary reports and provide valuable business intelligence services.

Task 4 – Cybersecurity Support: E-Logic excelled in providing a highly skilled cybersecurity analyst to enhance security measures and controls for the existing systems. By formulating and implementing robust plans and protocols, E-Logic effectively safeguarded digital files and information systems against unauthorized access, modification, and potential destruction. The team consistently maintained data confidentiality and diligently monitored security access. E-Logic also conducted thorough vulnerability testing, risk analyses, and comprehensive security assessments to ensure a highly secure environment.

Through its diligent efforts and expertise, E-Logic successfully supported the Selective Services System in maintaining and enhancing the Registration, Verification, and Compliance (RCV) system. We are confident in our ability to bring this level of expertise and dedication to meet the requirements of the State of South Dakota Office of Procurement Management and provide exceptional staffing solutions tailored to their unique needs.

**Reference 3.**

<b>Name of Organization</b>	U.S. Census Bureau
<b>Sub-Contract Number</b>	TREX-USCBSEIVID-092015-002
<b>Contract Name</b>	Senior PL/SQL Developers
<b>Period of Performance</b>	09/15/201 - 05/31/2021
<b>Type of Contract</b>	FFP
<b>Contract Role (Prime / Sub)</b>	Subcontractor
<b>Contract Value</b>	<b>\$702,720.00</b>
<p>E-Logic has a strong track record of successful past performance, particularly in supporting government agencies through subcontracting arrangements. One notable example is our subcontract with the U.S. Census Bureau, where we partnered with Prime Contractor Vidoori to provide comprehensive support in various areas.</p> <p>Under this subcontract, E-Logic was tasked with supporting the Integrated Product Teams, Technical Documentation, Continual Improvement, and Transition. We successfully delivered two full-time equivalent (FTE) PL/SQL Developers who worked closely with Team Vidoori Test Organization, utilizing effective configuration management processes and tools. Our team demonstrated a deep understanding of configuration management concepts, defect reporting and management, and consistently adhered to industry best practices.</p> <p>Moreover, our team exhibited extensive expertise in designing, evaluating, selecting, implementing, and supporting databases and metadata structures. We have a proven track record of redesigning data systems and processes, ensuring optimal efficiency and performance. Our ability to analyze complex information needs, data relationships, and attributes enabled us to deliver tailored solutions that met the specific requirements of the U.S. Census Bureau.</p>	

Throughout the engagement, our team actively collaborated with stakeholders to review requests for data and data usage, research new data feeds, and coordinate new data developments. We ensured seamless integration with existing data warehouse structures, maintaining data consistency and integrity. Our expertise extended to coordinating comprehensive testing of designed applications, designing dictionaries, and managing database structure and layout.

Additionally, we prioritized proactive maintenance, ensuring continued space availability, monitoring activity, and promptly addressing any issues that arose. Our team consistently worked towards improving performance and functionality, implementing best practice frameworks and methodologies to enhance overall system efficiency.

By leveraging our extensive experience and technical capabilities, E-Logic has consistently delivered exceptional results in similar engagements. We are confident in our ability to bring the same level of expertise and commitment to the temporary staffing services project for the Office of Hawaiian Affairs.

## **Background Check Methodology and Executive Retention Rates**

E-Logic Inc. employs a comprehensive, multi-layered background screening process designed to ensure that all identified candidates meet the highest professional, ethical, and compliance standards. Our process includes:

- **Identity Verification:** Confirmation of name, Social Security number, and employment eligibility.
- **Employment History Review:** Verification of prior positions, dates of employment, and professional responsibilities.
- **Education Verification:** Confirmation of all academic degrees, certifications, and professional licenses.
- **Criminal Background Screening:** Nationwide and state-specific criminal records search, sex offender registry check, and relevant civil litigation history review.
- **Financial and Credit History Check:** When appropriate for executive-level financial responsibility roles, a credit history review is performed to evaluate fiscal integrity.
- **Professional References:** Direct outreach to at least three professional references, including prior supervisors or board-level contacts, to gather qualitative assessments of leadership style, accomplishments, and character.
- **Conflict of Interest Review:** Evaluation of potential conflicts with NCPA's governance, operations, or contracting requirements.

Our candidate screening process is fully compliant with the Fair Credit Reporting Act (FCRA) and all applicable state and federal privacy and employment laws.

### **Executive Retention Rates:**

Over the last five years, 95% of executives placed by E-Logic Inc. have remained in their positions for at least three years, demonstrating both the quality of our vetting process and the alignment of candidates with client organizational culture and expectations. Our follow-up process includes scheduled check-ins with both the client and the candidate during the first 12 months to proactively address any concerns and support a successful transition.

**Acknowledgement of Agreement and Statement of Exceptions**

E-Logic Inc. hereby acknowledges that we take no exceptions to the requirements of this RFP, including but not limited to the terms and conditions of NCPA’s Consulting Services Agreement (Appendix A).

We have reviewed the insurance requirements, indemnification clause, and all other contractual terms in detail and confirm that E-Logic Inc. is fully willing and able to comply with the terms of the Master Task Consulting Services Agreement (MTCSA).

**PROPOSER:**

**Company:** E-Logic Inc.

**Address:** 2000 Pennsylvania Avenue NW, STE 7000, Washington DC 20006.

**Signed:**  **Title:** President and CEO

**Print Name:** Luis Padilla **Telephone:** (202) 499-7837

**E-mail:** Lpadilla@e-logic.us **Date:** 09/18/2025

**EXHIBIT B**

**COMPENSATION SCHEDULE AND HOURLY FEES**

Compensation for all tasks, including hourly fees and expenses, shall be **\$52,580**, subject to Section 2 of the Agreement. The hourly rates and/or compensation break down and an estimated amount of expenses is as follows:

<b>Phase</b>	<b>Hourly Rate</b>	<b>Estimated Hours</b>	<b>Subtotal</b>
Project Initiation (Engagement, profile development, outreach plan)	\$ 110.00	120	\$13,200
Candidate Shortlist (At least 10 candidate profiles, preliminary references)	\$ 110.00	120	\$13,200
Final Selection (Interviews, reference checks, negotiation support)	\$ 110.00	120	\$13,200
Project Management	\$ 79.00	120	\$9,480
<b>Subtotal Fees</b>			<b>\$49,080</b>
Estimated Expenses (advertising, background checks, technology platform)			\$3,500
<b>Grand Total</b>			<b>\$52,580</b>

The payment schedule for Consultant is:

<b>Phase / Milestone</b>	<b>Deliverable</b>	<b>Payment %</b>	<b>Amount</b>
Project Initiation	Engagement, profile development, and outreach plan	25%	\$13,200
Candidate Shortlist	Delivery of at least ten candidate profiles and preliminary references	25%	\$13,200
Final Selection	Completion of interviews, reference checks, and negotiation support	50%	\$26,180
<b>Total</b>		<b>100%</b>	<b>\$52,580</b>

NOTE: As a public agency, NCPA shall not reimburse Consultant for travel, food and related costs in excess of those permitted by the Internal Revenue Service.

**Lisbeth Sarabia**

**EDUCATION & CERTIFICATIONS**

1. **Financial Engineer-University of San Simon-2013-2016**
2. **Strategic Sales-Anahuac University-2019-2020**
3. **MBA-La Salle University-2020-2021**

**EMPLOYMEENT HISTORY (RECENTLY EXPERIENCE)**

**Project Manager**

E-Logic, Inc, Washington, DC

**2023 to present**

- Management of VAR (Value-Added Reseller), AV (Audio Visual), and Professional Services projects for US federal government. Analysis, evaluation, negotiation with vendors and customers and personnel, purchase of the project equipment to deliver the project on-time and within-budget according to the Federal Acquisition Regulation (FAR).
- Coordinate personnel to install Audio Visual project on-time and authorize budget for each project. Present, supervise and coordinate staff to each customer to provide them with their professional services according to customer and agency needs. The major challenge is to achieve the company goals by effectively planning, organizing, and managing the material, personnel, and financials resources, mitigating the risk, anticipate and manage change effectively according to international quality standards, such as PMBOK and monitoring each project according to the Key Performance Indicators established by the company, managing and training team members.

**Purchasing Manager**

E-Logic, Inc, Washington, DC

**2022 to 2023**

- Execution and management of VAR projects for US federal government, requesting financial resources to place orders which were previously analyzed and evaluated to be viable projects, negotiation with vendors and customers, and purchase of the project equipment to deliver the project on-time and within-budget.

**Business Analyst**

E-Logic, Inc, Washington, DC

**2017 to 2021**

- Analysis of opportunities and potential bids, search and comparison of equipment that can meet customer requirements, price analysis, negotiation, and quotation according to the specific requirements and vehicles of each opportunity which includes the pertinent documentation.

**Trainee Accounting**

E-Logic, Inc, Washington, DC

**2017**

- Support the Accounting department in different areas, such us: accounts payables, accounts receivables, cost analysis, tax forms, and verifying documentation of the company.



# William W. Professional Staffing

YOUR NEEDS ARE OUR #1 PRIORITY

## FOR EXECUTIVE RECRUITMENT SERVICE PROVIDERS

### Prepared by:

William W. Professional Staffing LLC  
Shawndetta Miller, CEO  
212-804-7908  
smiller@williamwprostaff.com



### Prepared for:

Northern California Power Agency  
651 Commerce Drive  
Roseville, CA 95678  
Attn: Brynna Bryant, NCPA  
Executive Recruitment Services

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## Cover Letter

### **Brynna Bryant**

Human Resources Manager  
Northern California Power Agency (NCPA)  
651 Commerce Drive  
Roseville, CA 95678  
[Brynna.Bryant@ncpa.com](mailto:Brynna.Bryant@ncpa.com)

### **Subject: Proposal Submission – Executive Recruitment Services for General**

Dear Ms. Bryant,

On behalf of **William W. Professional Staffing LLC (WWPS)**, I am pleased to submit our proposal in response to the **Northern California Power Agency’s (NCPA) RFP for Executive Recruitment Services to select a new General Manager**.

As a certified **Women-Owned Small Business (WOSB), Minority Business Enterprise (MBE), and Disadvantaged Business Enterprise (DBE)** with more than **16 years of experience** delivering strategic recruitment and workforce solutions to public sector organizations, WWPS brings the expertise, network, and capacity to lead this critical search with precision and care.

Our team has successfully conducted executive-level searches for **municipal governments, energy utilities, and compliance-driven agencies nationwide**, delivering high-caliber candidates for positions including Chief Executive Officer, General Manager, Chief Financial Officer, and Director-level roles. We understand the unique leadership, technical, and stakeholder management requirements of public power agencies and will apply this knowledge to ensure a **successful, timely, and well-governed recruitment process** for NCPA.

We are prepared to provide:

- A **comprehensive national search** that attracts a **diverse and highly qualified candidate pool**.
- **Strategic consultation with the Executive Committee and Commission** to align candidate profiles with NCPA’s goals, culture, and strategic priorities.

- **Structured evaluation, screening, and background processes** that ensure only the most capable and vetted candidates advance.
- **Transparent communications and milestone reporting**, with a clear recruitment timeline that aligns with NCPA's goal of appointing a new General Manager by early 2026.

We deeply appreciate the opportunity to partner with NCPA on this important transition and are committed to conducting a recruitment process that upholds the agency's reputation for excellence, innovation, and public service.

Thank you for your consideration. We look forward to the opportunity to contribute to NCPA's continued success.

Sincerely,



**Shawndetta Miller, MBA, HRM**

Chief Executive Officer

William W. Professional Staffing LLC

## Executive Summary

William W. Professional Staffing LLC (WWPS) is honored to submit this proposal to the Northern California Power Agency (NCPA) to provide executive recruitment services for the position of General Manager.

As a certified Women-Owned Small Business (WOSB), Minority Business Enterprise (MBE), and Disadvantaged Business Enterprise (DBE), WWPS brings more than 16 years of experience delivering strategic talent acquisition and executive search services to public agencies, municipal governments, and compliance-driven organizations nationwide.

Our firm specializes in identifying, attracting, and placing senior-level executives within complex public sector environments, including utilities, energy agencies, infrastructure authorities, and large municipal organizations. Our track record includes successful placements of Chief Executive Officers, General Managers, Chief Financial Officers, and Director-level leaders who have advanced operational performance and stakeholder trust in their respective agencies.

### Proposal Highlights:

- **Comprehensive, end-to-end recruitment approach** – from stakeholder consultation and candidate profiling to outreach, screening, interviews, and onboarding.
- **National search reach with a focus on diversity and inclusion**, ensuring a broad and competitive candidate pool.
- **Dedicated senior search team** with deep experience in public agency executive recruitment, available to work closely with NCPA's Executive Committee and Commission.
- **Rigorous screening and due diligence**, including reference verification, background checks, and conflict assessments for all finalists.
- **Clear project plan and timeline**, aligned with NCPA's goal of selecting a new General Manager by **Q1 2026**.
- **Transparent and competitive fee structure**, offering cost predictability while ensuring the highest quality of service.

WWPS understands that the selection of a new General Manager is one of the most consequential decisions facing NCPA's member agencies, staff, and stakeholders. We are committed to conducting this recruitment with the highest level of professionalism, confidentiality, and strategic alignment to NCPA's long-term goals.

<b>Name</b>	<b>Shawndetta Miller, MBA; MBA; HRM</b>
<b>Position</b>	President / CEO
<b>Company</b>	William W. Professional Staffing LLC
<b>Email</b>	<a href="mailto:smiller@williamwprostaff.com">smiller@williamwprostaff.com</a>
<b>Website</b>	<a href="https://www.williamwprostaff.com">https://www.williamwprostaff.com</a>
<b>Phone</b>	212-804-7908
<b>Fax</b>	212-634-4609
<b>Address</b>	276 5th Avenue, Suite 704-1395, New York, NY 10001
<b>LinkedIn</b>	<a href="https://linkedin.com/in/smillermbaprofessional">https://linkedin.com/in/smillermbaprofessional</a>
<b>Motto</b>	YOUR NEEDS ARE OUR #1 PRIORITY
<b>Federal UEI</b>	PLK6L5PQWRL9
<b>CAGE Code</b>	7R0L0
<b>Tax Number</b>	<b>26-3810798</b>



## Proposer's Qualifications

**William W. Professional Staffing LLC (WWPS)** brings more than **16 years of proven experience** conducting executive and senior leadership searches for **public sector agencies, municipal governments, utilities, and compliance-driven organizations nationwide**. As a certified **Women-Owned Small Business (WOSB), Minority Business Enterprise (MBE), and Disadvantaged Business Enterprise (DBE)**, we are deeply committed to delivering **diverse, qualified, and mission-aligned leadership talent** through a **comprehensive and structured recruitment methodology**.

Our firm has successfully placed Chief Executive Officers, General Managers, Chief Financial Officers, and Director-level executives for large public entities, consistently delivering results within aggressive timelines while upholding the highest standards of confidentiality, diligence, and stakeholder alignment.

### 1. Developing a Comprehensive Candidate Profile

WWPS understands that the foundation of a successful executive search lies in a precise and jointly agreed-upon candidate profile. We will begin this engagement by conducting a series of **structured discovery sessions** with NCPA's Executive Committee, Commission members, senior staff, and any other designated stakeholders.

During these sessions, we will:

- Facilitate interviews and listening sessions to understand NCPA's current operational structure, strategic priorities, key challenges, and future vision.
- Gather input on the leadership style, technical expertise, cultural attributes, and behavioral competencies that the next General Manager should embody.
- Administer an optional stakeholder survey to capture perspectives from member utilities, executive staff, and external partners.

We will synthesize this information into a **Leadership Competency Profile (LCP)** document that clearly outlines the desired qualifications, personal attributes, success metrics, and key performance indicators expected of the General Manager. This profile will serve as the **benchmark for all candidate evaluation and selection decisions**, ensuring full alignment with NCPA's strategic direction and culture.

## 2. Reviewing and Refining the General Manager Job Description

In collaboration with NCPA's Executive Committee and Human Resources, WWPS will review the existing General Manager job description provided in Appendix B and recommend any refinements needed to accurately reflect the position's current and future responsibilities.

This process will include:

- Benchmarking the GM job description against **peer public power agencies, joint action agencies, and municipal utilities** to validate scope, terminology, and competitive standards.
- Ensuring the job description incorporates evolving competencies such as regulatory advocacy, clean energy transition strategy, member engagement, and organizational change leadership.
- Streamlining the structure and language to make the position profile attractive and accessible to a national audience.

Our goal is to deliver a **clear, compelling, and market-competitive job description** that accurately conveys NCPA's expectations and attracts top-tier executive talent.

## 3. Designing and Implementing a Recruitment and Search Strategy

WWPS will develop and execute a **multi-layered, national recruitment campaign** designed to attract a diverse pool of highly qualified candidates from across the public power, energy, and infrastructure sectors. Our strategy includes:

- **Branding and Position Profile Development:** We will create a professional digital Position Profile and candidate landing page showcasing NCPA's mission, values, governance model, and the significance of the GM role.
- **Strategic Sourcing and Outreach:** We will leverage our proprietary executive talent network, sector-specific databases, and targeted outreach to executives in public utilities, energy agencies, municipal enterprises, and regulatory organizations.
- **Diversity & Inclusion Focus:** We will conduct targeted outreach through organizations such as Women in Energy, American Public Power Association (APPA), Blacks in Government, the Society for Advancement of

Chicanos/Hispanics and Native Americans (SACNAS), and other professional associations to ensure diverse representation.

- **Confidential Passive Candidate Recruitment:** WWPS will directly approach pre-identified high-potential executives who may not be actively seeking a role but are ideal fits for NCPA.

This approach ensures NCPA will receive a **robust, well-vetted, and diverse candidate pool** representing the strongest leadership talent in the market.

#### 4. Screening and Evaluating Candidates

To ensure only the most qualified individuals move forward, WWPS applies a **multi-phase evaluation framework** that balances objective data with behavioral insights.

Key steps include:

- **Initial Screening:** Review of résumés for alignment with the Leadership Competency Profile (LCP), mandatory qualifications, and public sector experience.
- **Behavioral and Competency Assessments:** Structured interviews assessing strategic thinking, executive decision-making, stakeholder engagement, and cultural alignment.
- **Reference and Credential Verification:** Contacting past employers and peers to verify track record, achievements, and management style; validating educational and professional credentials.
- **Risk Assessment:** Identifying any reputational, ethical, or compliance red flags early in the process.

WWPS will deliver a **longlist of 8–10 highly qualified candidates**, then refine it to a **shortlist of 3–5 finalists**, each accompanied by a **comprehensive candidate dossier** including résumés, reference summaries, evaluation scores, and alignment ratings against the LCP.

#### 5. Assisting in the Interview and Selection Process

WWPS will serve as a **facilitator, advisor, and coordinator** throughout the interview and selection phase to ensure consistency, confidentiality, and fairness.

We will:

- Coordinate scheduling and logistics for interviews (virtual and onsite), ensuring confidentiality and ease for both candidates and Committee members.
- Provide the Executive Committee with **custom interview guides, standardized scoring rubrics, and competency-based question sets** to enable structured and equitable assessments.
- Moderate debriefing sessions after each interview round to support consensus-building and mitigate bias.
- Offer guidance on final candidate ranking and selection based on objective evaluation metrics and observed performance during interviews.

This approach ensures the selection process is **structured, defensible, and aligned with best practices in public agency executive recruitment.**

## **6. Providing Independent Evaluation and Assessment**

WWPS serves as a **neutral, independent advisor** to the Executive Committee, delivering clear, evidence-based assessments of all finalist candidates.

Each finalist will be evaluated across:

- Alignment with the Leadership Competency Profile (skills, experience, and behavioral attributes).
- Cultural fit within NCPA's member-driven governance structure and collaborative work culture.
- Demonstrated record of executive-level decision-making, fiscal oversight, regulatory engagement, and strategic planning.
- Strengths, risks, and development areas, with clear recommendations for mitigating any identified concerns.

This **independent comparative analysis** will give the Executive Committee the clarity and confidence to select a finalist who is the strongest overall match for NCPA.

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## 7. Supporting Background Checks and Compensation Negotiation

Once a finalist is selected, WWPS will support NCPA through the final due diligence and offer negotiation phase.

Our responsibilities will include:

- Coordinating **legally compliant background checks, reference verifications, credential verifications, and conflict-of-interest checks**, in compliance with federal and California law.
- Providing **market compensation benchmarking data** from peer public power agencies to ensure the proposed salary and benefits package is competitive, equitable, and fiscally responsible.
- Assisting the Executive Committee and NCPA's General Counsel in **structuring, presenting, and finalizing the employment offer and contract**.
- Supporting the onboarding and transition planning process for the selected General Manager to ensure a smooth and confident start.

This comprehensive support will help NCPA **secure its preferred candidate while minimizing risk and ensuring legal and procedural compliance**.

### Depth of Capability and Capacity

- **Experienced Executive Search Team:** WWPS's executive search division is led by senior partners with over 20 years of combined experience placing C-level and GM-level leaders in public sector and utility organizations.
- **National Reach and Specialized Networks:** Access to over 25,000 vetted senior leaders across energy, utilities, public infrastructure, and regulatory bodies.
- **Dedicated Resources:** A fully assigned project team—including lead recruiter, project manager, compliance coordinator, and research analyst—dedicated exclusively to NCPA's search.
- **Technology Infrastructure:** Secure digital recruitment platforms to manage candidate information, communications, evaluations, and reporting.

- **Capacity for Timely Delivery:** Ability to execute a full recruitment cycle within 12–14 weeks, ensuring NCPA meets its goal of selecting a new GM by early 2026.

## Required Information

WWPS has assembled a dedicated executive search team to conduct the recruitment of the next General Manager for the Northern California Power Agency (NCPA). Each member brings deep experience recruiting executives and senior leaders within public agencies, community choice aggregators (CCAs), and public utilities, ensuring NCPA benefits from both industry expertise and proven search methodologies.

### **Shawndetta Miller – Chief Executive Officer & Executive Search Principal**

**Role:** Executive Sponsor and Strategic Advisor

- **Experience:** 18+ years leading large-scale talent acquisition initiatives for public agencies, municipal governments, energy utilities, and regulatory organizations nationwide.
- **Relevant Work:** Oversaw executive searches for CEO, General Manager, and Chief Financial Officer positions at multiple public entities, including large municipal utilities and regional infrastructure authorities.
- **Expertise:** Stakeholder alignment, leadership competency profiling, public-sector governance, and board/commission-level coordination.
- **Contribution to NCPA:** Will provide executive oversight, participate in profile development sessions with the Executive Committee, and serve as the escalation point throughout the recruitment.

### **Sidwell Miller – Director of Recruitment & Project Lead**

**Role:** Day-to-Day Project Manager and Lead Recruiter

- **Experience:** 15+ years specializing in executive and senior management searches across public-sector and energy-related organizations.
- **Relevant Work:** Led recruitment of senior directors, assistant general managers, and energy program executives for publicly owned utilities and CCAs.

- **Expertise:** Strategic sourcing, diversity outreach, passive candidate engagement, and multi-stage evaluation processes.
- **Contribution to NCPA:** Will manage the full recruitment lifecycle including outreach, screening, shortlisting, and interview coordination.

### **Sharon Miller – Director of Human Resources & Compliance**

**Role:** Background, Compliance, and Due Diligence Lead

- **Experience:** 14+ years in HR compliance, credentialing, and risk management for government and energy-sector clients.
- **Relevant Work:** Oversaw compliance for senior executive placements in heavily regulated environments, ensuring adherence to state and federal employment and public records laws.
- **Expertise:** Executive-level background checks, reference verification, credential audits, and confidentiality protocols.
- **Contribution to NCPA:** Will lead reference/background checks and coordinate all due diligence and risk-mitigation activities for finalist candidates.

### **Tim Brittan – Director of Operations**

**Role:** Interview Logistics and Stakeholder Coordination Lead

- **Experience:** 12+ years managing recruitment operations, candidate engagement, and board-level logistics for high-stakes executive searches.
- **Relevant Work:** Managed interview and selection logistics for GM and Director searches at multi-jurisdictional agencies and public utilities.
- **Expertise:** Candidate relations, panel scheduling, travel coordination, and structured evaluation documentation.
- **Contribution to NCPA:** Will manage interview logistics, support Executive Committee communications, and ensure a smooth candidate experience.

## **Simone Marie – Senior Executive Recruitment Specialist**

**Role:** Candidate Research and Screening Specialist

- **Experience:** 10+ years sourcing and screening senior leadership candidates for public entities and municipal utilities.
- **Relevant Work:** Provided longlist and shortlist support for executive searches across regulatory agencies, energy nonprofits, and joint powers authorities.
- **Expertise:** Market research, passive candidate identification, behavioral interviewing, and initial screening.
- **Contribution to NCPA:** Will develop and vet the initial pool of national candidates and support competency-based screening interviews.

## FEE PROPOSAL

<b>Phase</b>	<b>Deliverables</b>	<b>Estimated Duration</b>	<b>Fee</b>
<b>Phase 1</b>	Project kickoff, stakeholder interviews, candidate profile development, GM job description review	Weeks 1–3	<b>\$15,000</b>
<b>Phase 2</b>	National outreach and recruitment campaign, advertising, sourcing, longlisting and initial screening	Weeks 4–8	<b>\$20,000</b>
<b>Phase 3</b>	Shortlisting, structured interviews, candidate dossiers, reference and background checks	Weeks 9–12	<b>\$18,000</b>
<b>Phase 4</b>	Compensation benchmarking, offer negotiation, contract finalization, onboarding transition support	Weeks 13–14	<b>\$12,000</b>
<b>Total</b>			<b>\$65,000</b>

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## Relevant Experience and References

We are proud to have partnered with several organizations, providing temporary staffing services for clerical and administrative roles. Some of our clients include:

### **City of Rochester**

William W. Professional Staffing LLC (WWPS) proudly provides the City of Rochester with highly qualified Clerks, Clerk-Typists, Data Entry Specialists, and Administrative Assistants. These professionals are carefully recruited, vetted, and trained to support the City's diverse clerical and administrative needs across multiple departments. With a strong focus on accuracy, efficiency, and professionalism, WWPS ensures that each temporary staff member is equipped with the skills necessary to perform essential office functions, including filing, data entry, customer service, document processing, and administrative support. Our team's commitment to service excellence and responsiveness enables the City of Rochester to maintain smooth day-to-day operations while meeting fluctuating staffing demands with confidence.

### **Antoinette Downing**

City of Rochester 30 Church Street Rochester, NY 14614

Phone: **585-428-7389**

Email: **[antoinette.downing@cityofrochester.gov](mailto:antoinette.downing@cityofrochester.gov)**

### **Black Fox Group**

We provide Black Fox Group temporary staffing services. Our contract started January 2022 and is ongoing. Black Fox Group is a certified ISO 9001:2015 and ISO 22301:2019 firm with an array of experience in managing and delivering professional services to public, private, education, and nonprofit organizations across the globe. William W. Professional Staffing sources and recruits

Information Technology resources with a variety of specialized professional credentials. These positions require a nationwide approach.

The positions are assigned to report to federal and state government agencies, as well as private companies. Most applicants must hold top secret security clearance candidates are thoroughly vetted by William W. Pro-Staff. Our staff is experienced in sourcing, interviewing, and finding those hidden talents. The specialized recruitment services are possible because our database has been built to consist of a variety of resources nationwide. William W. Professional Staffing also has the benefit of utilizing our platform to recruit new talents to fill our clients staffing needs in this specialized sector.

**Contact:** Marcellus “Fox” Wade, MBA Chief Executive

**Officer Phone:** (202) 836-1968

**Email:** [mwade@blackfoxgroup.com](mailto:mwade@blackfoxgroup.com)

### **Field Control Analytics**

William W. Professional Staffing currently holds a contract with Field Control Analytics to provide long term temporary administrative staffing services. The length of this contract is five (5) years. The contract began in April of 2021 and is ongoing. Field Control Analytics leads the construction industry by combining products and services with innovative technologies that help minimize risk, increase productivity, improve reporting, and reduce cost.

**Contact:** Victoria Lloyd, Sr. Manager, Business Administration and Human Resources

**Phone:** (833) 227-0637

**Email:** [vlloyd@fieldca.com](mailto:vlloyd@fieldca.com)

## **JFK Millennium Partners**

**Contract Value:** \$700,000

**Service Locations:** New York (JFK Terminal Redevelopment Project)

**Contacts:**

John Girardi | (347) 583-7938 | JGirardi@vantageairportgroup.com

Amanda Spruill | (917) 992-4461 | ✉ aspruill@vantagegroup.com

**Services Provided:**

WWPS provides administrative and procurement support for the Terminal One Redevelopment initiative. Roles staffed include:

- Procurement Assistants and Project Support Coordinators
- Document Control Specialists
- Site-Based Office Managers
- Administrative Staff aligned with FAA and PANYNJ standards

## **Tiger's Maintenance and Building Inc.**

**Contract Value:** \$260,000

**Service Locations:** New York

**Contact:** Bertram Wiltshire | (917) 604-9596

**Services Provided:**

WWPS provides administrative, construction support, and IT staffing to scale Tiger's expanding service operations. Roles staffed include:

- Business Analysts and IT Support Technicians
- Project Coordinators
- Administrative Assistants
- Construction Cleanup Crews and Site Managers

## Other Information

### Background Check Methodology

WWPS maintains a **comprehensive and legally compliant background screening program** designed specifically for executive-level placements within public sector and regulated environments. For the NCPA General Manager recruitment, WWPS will conduct the following checks for all finalist candidates (with candidate consent):

- **Criminal Background Check**
  - Multi-jurisdictional federal, state, and county criminal records search
  - Sex offender registry search
- **Employment and Education Verification**
  - Verification of degrees, certifications, and all claimed employment history
- **Professional References**
  - Structured interviews with former supervisors, peers, and direct reports focusing on leadership competencies, decision-making, ethics, and performance
- **Credit and Financial Responsibility Checks** (*if requested*)
  - Conducted in accordance with the Fair Credit Reporting Act (FCRA)
- **Driving Record and Licensing Verification**
  - Especially relevant if the candidate will be traveling between NCPA facilities
- **Conflict of Interest Review**
  - Identify potential organizational or personal conflicts, especially related to NCPA member agencies or current vendors

All background investigations are performed by **FCRA-compliant third-party screening vendors** under WWPS supervision, ensuring confidentiality and adherence to federal and California employment law. NCPA will receive a **summary verification**

**report** for each finalist, not raw data, to preserve privacy while ensuring full due diligence.

### **Executive Retention Rates**

WWPS maintains an **exceptionally high retention rate** for executives placed through our search services.

- **92% of executives placed over the past five years have remained with their organizations for at least three years.**
- We attribute this success to our rigorous **leadership competency profiling, cultural alignment assessments, and post-placement support** which ensures long-term organizational fit and performance.
- We will apply this same methodology to the NCPA GM search to support a **stable, long-tenured appointment.**

### **Acknowledgement of Agreement and Statement of Exceptions**

WWPS has reviewed the RFP and the **NCPA Consulting Services Agreement (MTCSA, Appendix A)** and hereby certifies that:

**WWPS takes no exceptions to the RFP, the MTCSA, or the insurance and contractual requirements as stated.**

We are fully prepared to:

- Execute the Consulting Services Agreement without modification, and
- Comply with all insurance requirements, including:
  - Workers' Compensation: \$1,000,000
  - Commercial General Liability: \$2,000,000
  - Automobile Liability: \$2,000,000
  - Professional Liability (Errors & Omissions): \$1,000,000 per claim / \$2,000,000 aggregate

Certificates of insurance naming NCPA as additional insured will be provided upon award and prior to contract execution.

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## Shawndetta Miller, MBA, MBA

### Founder and Chief Executive Officer

### William W. Professional Staffing LLC

**Certified: WOSB | MBE | WBE | WBENC | DBE (Multi-State Certified)**

Shawndetta Miller was born in South America and raised in New York City, where she witnessed her parents' perseverance as immigrants striving to build a better life. Their determination laid the foundation for her own relentless pursuit of excellence. From an early age, Shawndetta envisioned creating a legacy of impact—empowering others, creating opportunities, and uplifting families and communities.

She began her career at the New York City Department of Education's Division of Instructional and Information Technology (DOIIT), balancing full-time work with graduate studies. After earning two master's degrees, she launched **William W. Professional Staffing LLC (WWPS)** in 2008—an **MWBE- and DBE-certified firm** committed to connecting exceptional talent with federal, state, and local agencies as well as private corporations. Her mission was bold: to bridge equity gaps through diversity-focused recruiting, bringing *hidden talent* to the forefront—locally and nationwide.

With **over 17 years of leadership in the staffing industry**, Shawndetta has been a tireless advocate for employment equity, economic inclusion, and community empowerment. Through WWPS, she not only delivers premier staffing solutions but also provides mentorship, career development, and workforce training to high school and college graduates—particularly from underserved communities.

**“My work is where passion finds its purpose—and purpose gets results.”**

## Certifications

- **Disadvantaged Business Enterprise (DBE)** – Certified in multiple states including NY, NJ, PA, CT
- **Woman-Owned Small Business (WOSB)**
- **Minority Business Enterprise (MBE)**
- **Women's Business Enterprise (WBE)**
- **WBENC-Certified Women's Business Enterprise**

## Education

- **MBA, Human Resource Management** – American InterContinental University
- **MBA, Business Management** – American InterContinental University
- **B.S., Strategic Management** – American InterContinental University

## Professional Affiliations

- International Society of Female Professionals
- National Association of Female Executives
- Greater New York Chambers of Commerce
- New York Women in Business

## Contact

**Phone:** 212-804-7908

**Email:** [smiller@williamwprostaff.com](mailto:smiller@williamwprostaff.com)

**Website:** [www.williamwprostaff.com](http://www.williamwprostaff.com)

**Address:** 276 5th Avenue, Suite 704-1395, New York, NY 10001

#### XIV. INDEMNIFICATION

Consulting firm shall indemnify, defend with counsel reasonably acceptable to the Agency, and hold harmless the Agency, and its officials, commissioners, officers, employees, agents and volunteers from and against all losses, liabilities, claims, demands, suits, actions, damages, expenses, penalties, fines, costs (including without limitation costs and fees of litigation), judgments and causes of action of every nature arising out of or in connection with any acts or omissions by Consulting firm, its officers, officials, agents, and employees, except as caused by the sole or gross negligence of Agency. Notwithstanding, should this Agreement be construed as a construction agreement under Civil Code section 2783, then the exception referenced above shall also be for the active negligence of the Agency.

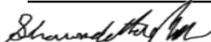
#### XV. ATTACHMENTS

- Appendix "A": Consulting Services Agreement
- Appendix "B": General Manager Job Description

#### PROPOSER:

**Company:** William W. Professional Staffing LLC

**Address:** 276 5th Avenue, Suite 704-1395, New York, NY 10001

**Signed:**  **Title:** CEO

**Print Name:** Shawndetta Miller **Telephone:** (212) 804-7908

**E-mail:** smiller@williamwprostaff.com **Date:** 09/18/2025





**BID Number:**  
Executive Recruitment Services

**Due Date & Time:**  
Sept 18, 2025, at 5:00 PM PST

**Proposed to:**  
California Power Agency

**Attn:** Brynna Bryant  
Northern California Power Agency  
651 Commerce Drive  
Roseville, CA 95678  
**Email:** [Brynna.Bryant@ncpa.com](mailto:Brynna.Bryant@ncpa.com)

**Proposed By:**  
Cogent Infotech Corporation  
Manu Mehta, President

**HQ:** 1035 Boyce Road, Suite 108, Pittsburgh, PA 15241  
**Local Address 1:** 500 Capitol Mall, Sacramento, CA 95814  
**Local Address 2:** 1800 North Vine Street Hollywood, Los Angeles, CA 90028  
✉ [manu.mehta@cogentinfo.com](mailto:manu.mehta@cogentinfo.com) | ☎ (412) 246-0708  
**Website:** [www.cogentinfo.com](http://www.cogentinfo.com)



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## Executive Summary

Cogent Infotech Corporation is a global, award-winning Workforce Solutions firm and a trusted partner to public agencies and government organizations for **over 22 years**. Incorporated in June 2003 as an S-Corporation, Cogent specializes in executive recruitment, professional staffing, and workforce solutions, having successfully delivered over 1,800 executive and professional placements across 200+ U.S. public sector entities and 80+ 500 fortune companies.

Our expertise spans public utilities, energy, transportation, housing, education, healthcare, and local government sectors—making us uniquely positioned to support the Northern California Power Agency (NCPA) in identifying and onboarding its next General Manager. Cogent’s executive search model combines advanced AI-powered sourcing tools, a robust national talent network, and a diversity-focused methodology, ensuring timely delivery of highly qualified leadership talent.

### Overview of the Proposal

Cogent proposes a comprehensive, structured, and results-driven executive search strategy to support NCPA in the recruitment and selection of its next General Manager by quarter 1, 2026. Key highlights of our approach include:

- ✦ **Collaborative Launch** – Conducting strategic planning workshops with NCPA’s Executive Committee and Commission to define role expectations, competencies, and organizational culture fit.
- ✦ **Position Profile & Outreach Plan** – Developing a detailed GM position profile and targeted outreach plan, incorporating diversity benchmarks and market compensation analysis.
- ✦ **Diverse Sourcing Strategy** – Deploying a multi-channel sourcing campaign leveraging AI-driven tools (ARIA, JobDiva), leadership networks, alumni groups, and industry forums to attract both active and passive candidates.
- ✦ **Secure Candidate Management** – Providing a password-protected candidate portal for NCPA to review candidate resumes, questionnaires, and detailed evaluation reports.
- ✦ **Comprehensive Evaluation & Screening** – Conducting behavioral, technical, and competency-based interviews; SME evaluations; and comprehensive background checks (including litigation history).
- ✦ **Interview & Selection Support** – Coordinating structured interviews, preparing NCPA’s panel with tailored guides, facilitating debriefs, and assisting in salary negotiations in consultation with NCPA’s General Counsel.
- ✦ **Onboarding & Retention Support** – Delivering structured 30-60-90 day follow-ups, executive integration plans, and retention-focused coaching to ensure long-term success.
- ✦ **Failed Search Contingency** – Providing a commitment to re-engage at no additional cost if the search does not yield a successful placement.

This approach ensures a seamless experience for NCPA from initiation to placement, while guaranteeing access to **high-caliber, diverse, and transformational executive talent**.

### Basic Proposer’s Information

Legal Name	Cogent Infotech Corporation
Legal Form	S – Corporation
Headquarter’s address	1035 Boyce Road, Suite 108, Pittsburgh, PA 15241
Local Office Address	500 Capitol Mall, Sacramento, CA 95814

### Primary Contact for this Proposal

Contact Name	Manu Mehta
Title	President
Phone	(412) 246-0708
Email	<a href="mailto:Govt-bids@cogentinfo.com">Govt-bids@cogentinfo.com</a>

## Proposer's Qualifications

**Cogent Infotech Corporation is an S-Corporation** that was incorporated in June 2003, and is a global, award-winning Workforce Solutions firm with extensive experience providing **Executive Recruitment Services** to the public and private sectors. With **over 22 years of proven success**, Cogent has established itself as a trusted strategic partner to government entities, public agencies, municipalities, transit authorities, higher education institutions, housing authorities, and Fortune 500 companies nationwide. Cogent thrives on long-term ethical relationships with its clients, employees, and stakeholders. We place a strong emphasis on the delivery of optimum services and solutions to our clients. Cogent specializes in public agency executive search with deep domain expertise across functional areas such as transportation, engineering, environmental policy, housing, education, law enforcement, IT, finance, and public safety—directly aligning with the mission and structure of the NCPA. Our scalable executive search methodology, emphasis on diversity and inclusion, and commitment to operational excellence position us as a strategic partner for identifying senior leadership that reflects the NCPA's values and objectives.

COGENT's commitment to excellence is reflected in our extensive list of certifications and partnerships. We adhere to the highest standards of quality, information security, and effective management processes, as evidenced by certifications including **ISO 9001, 20000, 27001, CMMI- ML-2** appraisal, and recognition as an **MBE-certified firm** from the **National Minority Supplier Development Council (NMSDC)**. These certifications underscore our unwavering commitment to excellence and our ability to consistently deliver value to our clients. Our company is among the fastest-growing MBE firms in the United States.

**About Cogent**

**Our Vitals**

- 22+ years of industry experience
- Nation-wide footprint across USA, western region and locally in California
- 11,000+ placements completed
- 400+ vertically aligned recruiters & Consultants
- 200+ US Govt & 80+ fortune 500 Agencies & Contracts
- One of the fastest growing MBEs in America
- 23+ awards for culture, diversity, benefits, and growth since 2022-2025

**Accolades**

MBE, CMMI level 3 and ISO 9001, 20000 and 27001 certified

NMSDC National Minority Supplier Development Council

ISO 9001, ISO 20000, ISO 27001, CMMI

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Due to unprecedented growth, Cogent has opened several satellite offices in California, Pennsylvania, Texas, New York, Florida, and Virginia to better service our customers and has dedicated teams focused on meeting with customers consistently to understand their needs and deliver the absolute best solutions for their Executive and Professional Recruitment Services and other required services personnel's needs. Our ability to network within the local community and user groups gives us the edge to attract, hire, and retain superb and well-versed candidates across the nation, and we have proven ourselves thus far working with multiple public-sector entities since 2003.

Cogent provides top talent, resources, and market expertise with a specific focus on Executive Recruitment Consultant Services for the government sector, leveraging over 22 years of industry experience. Our comprehensive

understanding of recruitment needs enables us to deliver world-class services through ***Executive Search Services, temporary staff placements, direct hire, temp-to-hire, and temp-to-permanent positions for both short- and long-term contract*** assignments. This expertise allows us to efficiently meet the service requirements of the NCPA, ensuring timely and professional service delivery. Our gradual expansion over the years reflects the shifting demands of the recruitment market. We now have a nationwide footprint, offering executive search services to government agencies across all 50 states. Our clients include ***County of Riverside, San Mateo County, California State University, Los Angeles Unified School District (LAUSD), San Mateo County Transit District, City of Los Angeles, Office of the City Clerk, Hemet Unified School District, City of Sacramento, Housing Authority of the City of Alameda, University Of California-Irvine, Riverside Unified School District of Riverside County, Sacramento Regional County Sanitation District, County of Sacramento, Kern Health System, Alameda-Contra Costa Transit District's, CalOptima, Atlanta City Housing Authority, University Hospital, Kansas Office of the Attorney General, San Mateo County Transit District, Jacksonville Transportation Authority, Texas Tech University Health Sciences Center, Hillsborough Transit Authority, Seminole County, City of Sacramento, Cincinnati Metropolitan Housing Authority, The School Board of Broward County, County of Chester, Montgomery County, State of Rhode Island, CalOptima, State Universities Retirement System, Multnomah County, St. Louis Community College, and more.***

Our 22 years of success are built on a commitment to reliability for our clients and stakeholders. We originated with the goal of assisting thousands of job seekers in securing fulfilling positions with a variety of companies, including Fortune 100 firms, government agencies, and high-tech startups. This relentless pursuit of defect eradication and customer satisfaction remains at the heart of our mission.

Our team includes seasoned executive recruiters, account managers, sourcing analysts, HR professionals, compliance officers, and administrative support staff. With strategically located offices in California, Pennsylvania, Texas, New York, Florida, and Virginia, Cogent maintains a national footprint and the operational scale necessary to serve complex recruitment engagements across multiple jurisdictions.

Cogent brings over two decades of experience recruiting C-level executives, directors, department heads, General Managers, Project Managers, and senior leadership roles for state agencies, local governments, public transit systems, housing authorities, and higher education institutions. Our commitment to customized recruitment strategies, stakeholder collaboration, and results-driven delivery has earned us long-term partnerships with numerous public sector entities.

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## Why COGENT

Choosing COGENT means partnering with a proven leader in executive placement. Our track record spans various sectors, ensuring we're equipped to tackle even the most complex hiring challenges while delivering exceptional talent.



- ✓ **Proven Executive Search Success:** Demonstrated history of successfully placing C-level executives, General Managers, and senior leadership roles for government agencies, public utilities, housing authorities, transit agencies, and higher education institutions nationwide.
- ✓ **Public Sector Executive Recruitment Expertise:** Specialized focus on identifying and attracting leaders who can navigate the complexities of public sector organizations, manage large budgets, and drive strategic transformation within regulated environments.
- ✓ **Tailored & Consultative Recruitment Approach:** Our executive searches are highly customized, combining in-depth stakeholder consultations, market mapping, candidate profiling, and competency-based evaluations to ensure optimal leadership fit.
- ✓ **Deep Industry & Regulatory Knowledge:** Extensive experience in recruiting executives for regulated sectors (municipalities, administration, utilities, transportation, housing, healthcare, education, etc.) with a thorough understanding of governance, compliance, and policy frameworks impacting executive leadership.
- ✓ **Diversity-Driven Executive Sourcing:** Dedicated Diversity & Inclusion specialists ensure that all searches are aligned with EEO, OFCCP, and Affirmative Action goals, consistently delivering diverse and representative leadership pipelines.

- ✓ **Robust National Talent Network:** Access to an expansive proprietary database of 4.5M+ vetted professionals and established networks within industry associations, alumni groups, and leadership forums to reach both active and passive executive talent.
  - ✓ **Long-Term Public Sector Partnerships:** Trusted by 200+ U.S. public sector organizations as a long-term recruitment partner, with a proven ability to build sustainable leadership teams that support organizational stability and growth.
- Results-Driven, Client-Centric Delivery:** Known for our high-touch, client-focused service model, with dedicated teams providing ongoing progress updates, transparent communication, and a strong commitment to timely, high-quality executive placements.

**Some of our key features are listed below:**

- ✚ Exceptional ability to inspire, train, and motivate staff.
- ✚ Highly competent and skilled recruiting team. Competitive and flexible pricing model.
- ✚ Proven track record in the Executive Recruitment industry, having successfully delivered **Executive Search and Direct Hire services to over 200+ public sector clients**, and placed **more than 1800 executive and direct hire positions** across federal, state, local government, energy and utilities, education, and healthcare institutions.
- ✚ Quick turnaround, quality talent, and an in-depth understanding of procurement and recruitment processes.
- ✚ Right Person, at the Right Place, and at the Right time with the highest level of integrity, dedication, and commitment.
- ✚ Knowledge and experience in the Executive Recruitment industry will help you achieve growth in your organization.

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## Experience

### Relevant Project Experience

We have successfully executed numerous executive and senior-level searches for high-impact roles in **municipal agencies, energy and utilities, transit authorities, healthcare systems, education, housing authorities, and many other** under similarly scoped “as-needed” agreements. Below are representative engagements aligned with the size and complexity of the NCPA:

Category: Executive and Senior Management		
Name of the Client	Job Position	No. of Placements
<b>Community Transit</b>	Chief Technology Officer	1
<b>State of Rhode Island</b>	Procurement Director	1
<b>University Hospital</b>	Senior Director	1
<b>Baltimore City Information &amp; Technology</b>	General Managers	4
<b>Caloptima Health</b>	General Managers	3
	Medical Case Managers	6
<b>Thermofisher</b>	Scientist III	2
	Scientist II	6
	Scientist I	8
	Senior Formulation Manager	4
	Senior Programmer Analyst	5
	Business Professional - Senior Site Specialist	4
<b>Kern Health Systems</b>	Senior Manager	2
<b>Central Ohio Transit Authority</b>	Marketing Managers	4
<b>City of Philadelphia</b>	General Managers	3
	Project Managers	5
<b>Dallas Housing Authority</b>	Property Managers	7
<b>New York Power Authority</b>	IT Project Managers	9
<b>New York City Housing Authority</b>	Attorney- Level 03	3
	Senior Program Manager	12
	Contract Manager	4
	Sr. Project Manager (Housing Authority)	28
	Senior Business Analyst	2
<b>Office of Mental Health</b>	Executive Secretaries and Administrative Assistants	1
<b>Tarrant County</b>	Senior Administrative Manager	3
<b>NiSource</b>	Project Managers - Senior	2
<b>State of MA</b>	Technical Project Managers	2
<b>NM Human Service Department</b>	Financial Service Contract Manager	1
<b>Harris Health Systems</b>	Chief Operating Officer (COO)	1
<b>Multnomah County</b>	Business System Analyst (BSA) Senior	4
<b>State of Vermont</b>	Project Managers	3
<b>Amtrak</b>	PMO Project Manager Senior	6
	Senior Project Managers	15
	Construction Managers	4
	Portfolio Managers	3
	Quality Control Analyst - Senior	3
<b>New York City Employees Retirement System (NYCERS)</b>	Public Works Director	1
	Senior Quality Assurance Analyst	3
<b>DFW Airport</b>	Project Managers - Senior	5
	Senior Application Developer	2
<b>Atos IT Solution and Services</b>	General Project Manager	2
<b>Austin Energy</b>	Project Managers	7

UCSF	Program Managers	2
	Cyber Compliance Project Manager	1

Cogent’s extensive experience includes partnering with public sector organizations, transit authorities, healthcare providers, housing authorities, education clients, and other large institutions to deliver tailored recruitment, executive search, and Direct hire services that align with their unique operational needs.

Below is a list of recent and ongoing contracts in the section that follows, showcasing our experience and capacity to fulfill the demands of this RFP. These projects show our ability to meet deadlines, provide excellent services, and assist our clients in accomplishing their strategic goals.

Cogent’s Executive Search & Recruitment Contracts			
Client Name	Title of Service Provided	Role & Responsibilities of COGENT	Duration
<b>Colorado Community College System</b> 	Key Position Recruitment Support	This engagement, issued on behalf of the State of Colorado, establishes Cogent as a qualified recruitment partner to deliver on-demand recruitment services for critical leadership and administrative roles. The contract will be utilized by the CCCS System Office and its 13 statewide community colleges, enabling access to a diverse pool of highly qualified candidates.	Aug 2025 - Ongoing
<b>Florida International University Board of Trustees</b> 	Executive Search Firms	Cogent has been selected as a qualified vendor by the <b>Florida International University Board of Trustees</b> to provide <b>Executive Search Services</b> . This competitive solicitation enables FIU to partner with Cogent in sourcing highly qualified candidates for leadership roles across the Higher Education environment. Cogent’s role includes leveraging our <b>AI-powered recruitment platforms, higher education expertise, and extensive candidate networks</b> to assist FIU in addressing its leadership recruitment needs.	July 2025 - Ongoing
<b>County of Riverside</b> 	Executive Search and Recruiting Services	Cogent has been awarded a contract with the <b>County of Riverside</b> to provide <b>Executive Search and Recruiting Services</b> . Under this engagement, Cogent supports the County in identifying, attracting, and placing top-tier leadership talent for a wide range of critical positions. The scope of work includes managing the entire recruitment lifecycle—market research, candidate sourcing, screening, interviewing, and placement—while ensuring alignment with the County’s organizational goals.	June 2025 - Ongoing
<b>Rhode Island Department of Administration</b> 	Executive Recruitment Firm Services	Cogent was awarded a contract by the <b>Rhode Island Department of Administration, Division of Human Resources</b> , to deliver <b>Executive Recruitment Services</b> across multiple state departments. The scope of this contract covers recruitment for senior-level roles in <b>Education, Health Care, Human Services, Finance, Human Resources, and Administration</b> . Cogent’s responsibilities include candidate sourcing, targeted outreach, interviewing, screening, and placement. Through this engagement, Cogent provides the State with <b>efficient, compliant, and results-driven executive search solutions</b> , ensuring access to a qualified and diverse leadership pipeline to meet the evolving needs of Rhode Island’s public sector.	April 2025 - Ongoing

<p><b>Atlanta City Housing Authority, GA</b></p> 	<p>Leadership Direct Hire Search and Employment Services</p>	<p>Cogent was awarded a multi-year contract with the Atlanta Housing Authority to provide executive search services, ensuring the identification of a diverse and highly qualified talent pool. Our expertise in executive recruitment enables us to support Atlanta Housing in sourcing top leadership talent tailored to their organizational needs. Through a strategic and inclusive approach, we help drive workforce excellence and long-term success for AH.</p>	<p>February 2025 - Ongoing</p>
<p><b>University Hospital, NJ</b></p> 	<p>Search Services &amp; HR Consulting</p>	<p>Cogent was awarded a contract with University Hospital to provide executive search and HR consulting services, recruiting executives, healthcare professionals, IT staff, and auditing and coding specialists to support the hospital's critical workforce needs.</p>	<p>November 2024 - Ongoing</p>
<p><b>Kansas Office of the Attorney General</b></p> 	<p>Attorney Recruitment Services</p>	<p>Provided executive search services for Civil Division attorneys, leveraging targeted outreach, industry networking, and comprehensive candidate assessments.</p>	<p>January 2025 - Ongoing</p>
<p><b>San Mateo County Transit District, CA</b></p> 	<p>On-Call Full Cycle and Sourcing Recruitment Services</p>	<p>Partnered with the San Mateo County Transit District, JPB, and TA to provide strategic recruitment for roles in Accounting, Finance, Procurement, HR, Project Management, Engineering, and IT.</p>	<p>December 2024 - Ongoing</p>
<p><b>Jacksonville Transportation Authority, FL</b></p> 	<p>Professional Recruitment Services</p>	<p>Recruited top-tier executive and engineering professionals to support MOVE 2027 Strategic Plan and enhance Jacksonville's transportation system.</p>	<p>August 2024 - Ongoing</p>
<p><b>Texas Tech University Health Sciences Center</b></p> 	<p>Recruitment and Search Assistance</p>	<p>Provided full-cycle executive recruitment, covering advertising, candidate screening, interview logistics, and research support.</p>	<p>July 2024 - Ongoing</p>
<p><b>Hillsborough Transit Authority, FL</b></p> 	<p>Executive Search Services</p>	<p>Led executive searches for key leadership roles in public transportation, ensuring strategic alignment with HART's mission.</p>	<p>July 2024 - Ongoing</p>
<p><b>Seminole County, FL</b></p> 	<p>Executive Search and Recruitment Services</p>	<p>Conducted executive recruitment for County Managers, Directors, Attorneys, Engineers, and Division Managers to ensure high-quality leadership placements.</p>	<p>May 2024 - Ongoing</p>
<p><b>City of Sacramento, CA</b></p> 	<p>Citywide Recruitment Services</p>	<p>Managed end-to-end recruitment services for administrative, technical, and leadership roles to support workforce development.</p>	<p>June 2024 - Ongoing</p>
<p><b>State of CT - Department of Administration Services</b></p>	<p>Professional Recruiting Services</p>	<p>Primary vendor for hard-to-fill positions in Healthcare, Human Services, IT, Civil Engineering, Education, and Public Service Leadership.</p>	<p>February 2024 - Ongoing</p>

			
<b>Cincinnati Metropolitan Housing Authority, OH</b> 	Contract Labor and Executive Search Services	Led nationwide executive search services for senior positions in finance, IT, HR, legal, real estate, and housing management.	September 2023 – Ongoing
<b>The School Board of Broward County, FL</b> 	Recruiting Search Services for Full-Time Technology Positions	Selected as a top vendor for recruiting Chief Information Officers and IT executives.	September 2022 – Ongoing
<b>County of Chester, PA</b> 	Recruitment Search Services	Held a multimillion-dollar contract for recruiting hard-to-fill positions, including Optometrists and Project Delivery Directors.	July 2022 – Ongoing
<b>Montgomery County, PA</b> 	Professional Employment Search Firms	Provided executive search services for leadership roles, including Human Resource Directors and IT Chief Executive Officers.	April 2022 – Ongoing
<b>State of Rhode Island, RI</b> 	Executive Recruitment	Placed key executive roles, including Executive Director, Human Resource Director, and Chief Executive Officer.	May 2022 – Ongoing
<b>Ramsey County, MN</b> 	IT-Related and Financial-Related Recruitment and Search Services	Managed direct hire placements for Chief Financial Officers, Portfolio Managers, and Retirement Planning Counselors.	May 2022 – Ongoing
<b>CalOptima, CA</b> 	Executive Recruiting Services	Conducted executive searches for Business Development Officers and Executive Directors.	May 2022 – Ongoing
<b>State Universities Retirement System, IL</b> 	Executive Recruiting Services	Competed in a highly selective contract for C-suite recruitment, securing executive placements for professorial and senior leadership roles.	December 2019 – Ongoing
<b>Multnomah County, OR</b> 	Recruitment Services for Specialized IT, Finance, and Business Administration	Conducted executive search and staffing for C-suite roles, including Chief Executive Officer (CEO), IT, Finance, and Business Administration positions.	December 2019 – Ongoing
<b>St. Louis Community College, MO</b>	Technical Recruiting Services	Recruited technical leadership roles, including Technical Programming Managers, Media Associates, and Senior Oracle & Database Systems Administrators.	December 2019 – Ongoing

			
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Below are selected case studies showcasing COGENT’s proven expertise in executive recruitment. These examples highlight our ability to identify top leadership talent, implement strategic hiring processes, and deliver successful outcomes for our clients.

### Case Study #1

<b>Case Study of Community Transit</b>	
	<p><b>Contract Name:</b> <i>IT Consulting Services Roster</i></p> <p><b>Job Title provided:</b> <i>Chief Technology Officer</i></p> <p><i>Cogent has been performing services under this contract as a sole prime vendor without the use of any subcontractors.</i></p>
<p><b>Summary of the Case</b></p> <p><i>Community Transit, a leading public transportation provider in Washington State, engaged Cogent Infotech under its <b>IT Consulting Services Roster</b> contract to lead the recruitment of a <b>Chief Technology Officer (CTO)</b>. As the sole prime vendor—with no subcontractors—Cogent was responsible for identifying a strategic technology leader to drive innovation and modernization across the agency’s IT ecosystem.</i></p>	<p><b>Challenge</b></p> <p>Community Transit sought a visionary CTO to lead its enterprise-wide technology modernization efforts, including enhancing digital infrastructure, improving cybersecurity resilience, and integrating intelligent transportation systems (ITS). The challenge was to recruit a candidate with <b>deep transit industry experience</b>, technical leadership, and the strategic foresight to align technology with long-term service goals—within a limited timeline and without disruption to ongoing operations.</p> <p><b>Solution</b></p> <p>Cogent deployed its <b>executive recruitment methodology</b>, beginning with strategic consultations to understand Community Transit’s operational and technology priorities. We conducted a <b>targeted national search</b> for senior transit IT leaders with proven expertise in cloud adoption, infrastructure scalability, and public sector digital innovation. Using proprietary sourcing tools and niche industry networks, Cogent curated and assessed a competitive shortlist. We also supported the client through <b>interview coordination, reference checks, contract negotiations, and onboarding</b>.</p> <p><b>Result</b></p> <p>Cogent successfully placed a <b>highly qualified CTO</b> who has since led Community Transit’s efforts in <b>IT infrastructure modernization, smart ticketing, and real-time passenger information systems</b>. The placement accelerated the agency’s <b>cybersecurity strategy</b>, improved cross-departmental collaboration, and positioned Community Transit as a <b>regional leader in public transit innovation</b>. All hiring milestones were achieved within the client’s required timeframe, ensuring a seamless and high-impact transition.</p>

### Case Study #2

<b>Case Study of the State of Rhode Island</b>	
	<p><b>Contract Name:</b> <i>Recruitment/Scouting for Purchasing Agent</i></p> <p><b>Job Title provided:</b> <i>Procurement Director</i></p> <p><i>Cogent Infotech Corporation has been providing services as a contracted staffing partner to the State of Rhode Island since July 2024.</i></p>
<p><b>Summary of the Case</b></p> <p><i>The State of Rhode Island engaged Cogent Infotech Corporation under Contract MPA 609 to lead the recruitment of a Purchasing Director, a critical leadership role overseeing state-wide</i></p>	<p><b>Challenge</b></p> <p>The State faced an urgent need to identify and appoint a qualified <b>procurement leader</b> with deep expertise in <b>government contracting, regulatory compliance, vendor negotiations, and strategic sourcing</b>. The role required a candidate capable of modernizing procurement practices, improving cost efficiency, and ensuring strict adherence to both state and federal procurement laws — all within a compressed timeline.</p> <p><b>Solution</b></p> <p>Cogent implemented a <b>full-service executive search process</b>, including targeted outreach, candidate assessment, and regulatory alignment. We curated a <b>diverse and</b></p>

<p><i>procurement operations. Cogent has been a staffing partner to the State since July 2024, delivering high-quality executive search services tailored to public sector requirements.</i></p>	<p><b>high-quality talent pool</b>, focusing on individuals with proven leadership in public sector procurement. Our recruitment team provided <b>end-to-end support</b>—from sourcing to interview coordination, compliance vetting, and onboarding. Our deep domain knowledge in government procurement allowed us to align every candidate evaluation with the State’s unique operational and compliance environment.</p>
	<p><b>Result</b>                  Cogent successfully filled the <b>Purchasing Director</b> role within the required timeline, ensuring a <b>seamless transition</b> and uninterrupted procurement operations. The appointed leader brought enhanced <b>cost-control strategies, vendor oversight, and regulatory expertise</b>—directly improving contract execution, supplier relationships, and compliance processes. Positive client feedback reinforced Cogent’s reputation as a trusted executive recruitment partner for high-impact government roles.</p>

### Case Study #3

#### Case Study of the North Texas Tollway Authority (NTTA)

	<p><b>Contract Name:</b> <i>Direct Hire Contract</i></p> <p><b>Job Title provided:</b> <i>Intelligent Transportation System (ITS) Technician and Lane System Resources</i></p>
<p><b>Summary of the Case</b></p> <p><i>The North Texas Tollway Authority (NTTA) partnered with Cogent Infotech Corporation to fulfill direct hire recruitment for two specialized technical roles: an Intelligent Transportation System (ITS) Technician and a Lane System Technician. These positions are mission-critical in maintaining and enhancing NTTA’s tolling infrastructure and intelligent traffic systems across the region.</i></p>	<p><b>Challenge</b>                  NTTA needed to quickly identify and hire qualified professionals with <b>hands-on experience in intelligent transportation systems</b>, field hardware diagnostics, and real-time traffic operations. The ideal candidates also had to meet strict compliance and technical certification requirements, making the search particularly narrow. Time sensitivity and the need for a <b>precise talent match</b> added complexity to the recruitment process.</p> <p><b>Solution</b>                  Cogent conducted a <b>targeted, skills-based direct hire search</b>, leveraging our proprietary IT and engineering talent database and local Texas recruitment teams. We screened candidates for <b>field technical acumen, systems troubleshooting experience, and familiarity with tolling or transportation systems</b>. Through continuous collaboration with NTTA stakeholders, we refined candidate profiles and ensured alignment with both job specifications and cultural fit. We also managed <b>salary negotiation and onboarding support</b>.</p> <p><b>Result</b>                  Both roles—<b>ITS Technician and Lane System Technician</b>—were successfully filled with <b>qualified, vetted professionals</b> within NTTA’s expected timeline. The candidates seamlessly integrated with the agency’s technical team, contributing to <b>tollway efficiency, real-time system support, and enhanced field operations</b>. In a formal reference, NTTA rated Cogent highly across multiple categories, noting our <b>exceptional customer service, attention to detail, responsiveness</b>, and proactive communication. The client confirmed they would <b>recommend Cogent</b> for future staffing engagements.</p>

### Case Study #4

#### Case Study of the New York City Housing Authority (NYCHA)

	<p><b>Contract Name:</b> <i>Professional Staffing Services</i></p> <p><b>Job Title provided:</b> <i>Attorney 1 &amp; 3, Project Managers, and Vice President of Operations</i></p> <p><i>Cogent was contracted to recruit executive and departmental leaders to support NYCHA’s operations, IT modernization, and administrative transformation initiatives.</i></p>
<p><b>Summary of the Case</b></p> <p><i>Cogent Infotech Corporation has been a trusted staffing partner to NYCHA, delivering</i></p>	<p><b>Challenge</b>                  NYCHA needed to rapidly scale its leadership and technical capacity to support public housing operations across 325+ developments. The agency required professionals with not only the right credentials but also deep knowledge of government regulations, public service delivery, and large-scale urban infrastructure projects.</p>

<p><i>executive and technical recruitment services for a wide range of mission-critical roles. Under this contract, Cogent successfully placed professionals in key leadership and functional positions, including Attorney I &amp; III, Project Managers, and Vice President of Operations, contributing significantly to NYCHA’s operational stability and service delivery.</i></p>	<p><b>Solution</b> Cogent deployed a high-touch, strategic sourcing model that included:</p> <ul style="list-style-type: none"> <li>• Executive search and legal recruitment tailored to public housing operations.</li> <li>• Deep talent pipelines in legal, operations, and project management disciplines.</li> <li>• Seamless onboarding support, including incumbent transitions and compliance management.</li> <li>• Collaboration with NYCHA leadership to ensure alignment with their organizational mission.</li> </ul>
	<p><b>Result:</b></p> <ul style="list-style-type: none"> <li>• Successfully placed 450+ professionals, including executive and legal leaders.</li> <li>• Strengthened NYCHA’s legal and operational oversight through strategic hires like Attorney III and VP of Operations.</li> <li>• Enabled modernization efforts and project continuity via seasoned Project Managers.</li> <li>• Enhanced tenant services and internal efficiencies, helping NYCHA remain compliant, agile, and responsive.</li> </ul>

### Case Study #5

#### Case Study of the State of Kansas

	<p><b>Contract Name:</b> <i>Professional &amp; Executive Recruitment Services</i></p> <p><b>Job Title provided:</b> <i>Vice President of Marketing, Attorney III, and Project Managers</i></p> <p><i>Cogent was contracted to recruit executive and departmental leaders to support NYCHA’s operations, IT modernization, and administrative transformation initiatives.</i></p>
<p><b>Summary of the Case</b></p> <p><i>Cogent Infotech Corporation was engaged by the State of Kansas to support its recruitment efforts for high-impact executive and managerial positions. Roles included <b>Vice President of Marketing, Attorney III, and Project Managers</b> across various state departments. Cogent’s strategic recruitment model ensured timely placements of professionals with a deep understanding of public sector dynamics and compliance mandates.</i></p>	<p><b>Challenge</b> The State of Kansas required prompt fulfillment of niche leadership roles with a high degree of specialization—particularly in legal, marketing, and project oversight domains. Finding candidates who could navigate the public sector environment and bring transformational leadership was critical, especially within limited timeframes.</p> <p><b>Solution</b> Cogent implemented a targeted search strategy that included:</p> <ul style="list-style-type: none"> <li>• Custom outreach campaigns using public sector and executive networks.</li> <li>• Pre-screening candidates for both technical competencies and leadership alignment.</li> <li>• Coordination with state HR officials to streamline interviews and ensure cultural fit.</li> </ul> <p><b>Result:</b></p> <ul style="list-style-type: none"> <li>• Successfully placed top-tier talent in all requested roles.</li> <li>• Strengthened the State’s capacity in legal, marketing, and operational execution.</li> <li>• Supported agency modernization goals with leaders equipped to drive innovation.</li> <li>• Reinforced Cogent’s reputation for delivering executive talent in high-stakes government settings.</li> </ul>

## Strategy

Cogent's **Recruitment Work Plan** is designed to deliver a seamless, efficient, and high-quality hiring experience. By leveraging **advanced technology, industry expertise, and a structured five-step approach**, our team ensures the successful identification, evaluation, and onboarding of top executive talent. The following work plan outlines our **strategic methodology**, key personnel contributions, and commitment to long-term leadership success.

Steps Involved	Work Plan Process
<b>Step 1: Kick-off &amp; Position Profile Development</b>	<p><b>Led by:</b> Manu Mehta (Program Manager), Account Manager, Recruitment Manager</p> <ul style="list-style-type: none"> <li>Conduct strategic planning with NCPA's Executive Committee and Commission.</li> <li>Define role expectations, leadership competencies, and cultural fit.</li> <li>Develop a <b>comprehensive position profile</b> and establish <b>recruitment benchmarks</b>.</li> </ul>
<b>Step 2: Targeted Outreach &amp; Diverse Sourcing</b>	<p><b>Led by:</b> Recruitment Manager, Sourcing Team, Diversity &amp; Inclusion Specialist</p> <ul style="list-style-type: none"> <li>Launch a multi-channel sourcing campaign using AI tools (ARIA, JobDiva), executive networks, alumni groups, and utility forums.</li> <li>Engage national, regional, and local talent, including passive candidates.</li> <li>Ensure a diverse candidate pool through targeted outreach guided by Cogent's Diversity &amp; Inclusion Specialist.</li> </ul>
<b>Step 3: Candidate Portal, Screening &amp; Evaluation</b>	<p><b>Led by:</b> Recruitment Manager, Subject Matter Experts (SMEs), Compliance Team</p> <ul style="list-style-type: none"> <li>Create a secure, password-protected candidate portal for NCPA's review of resumes, questionnaires, and reports.</li> <li>Conduct multi-step candidate assessments, including SME-led interviews and compliance checks.</li> <li>Deliver at least 10 detailed candidate profiles with background, references, and litigation history.</li> </ul>
<b>Step 4: Interview Coordination &amp; Legal Consultation</b>	<p><b>Led by:</b> Account Manager, Recruitment Manager, Client Liaison Team</p> <ul style="list-style-type: none"> <li>Coordinate interviews and provide structured guides tailored to the GM role.</li> <li>Facilitate Executive Committee assessments and candidate debriefs.</li> <li>Support contract negotiations and consult with NCPA's General Counsel on legal/contractual matters.</li> </ul>
<b>Step 5: Transition, Retention &amp; Failed Search Plan</b>	<p><b>Led by:</b> HR Specialist, Client Success Manager, Account Manager</p> <ul style="list-style-type: none"> <li>Support onboarding with <b>30-60-90 day check-ins</b> and leadership coaching.</li> <li>Ensure alignment with NCPA's strategic and cultural goals.</li> <li>If a search is unsuccessful, <b>re-engage at no additional cost</b>, activating secondary candidate pipelines.</li> </ul>

## Methodology

### COGENT's Recruitment Process

Cogent's Executive Recruitment Process is designed to deliver high-caliber leadership talent through a strategic, multi-phase approach. From requirement analysis to post-placement support, our process ensures efficiency, precision, and alignment with organizational goals.

As a part of our Executive Recruitment, we deliver all aspects of human resource management as an external provider, and with the professional and business issues associated with operating such a practice—including client development, contracts and client management.



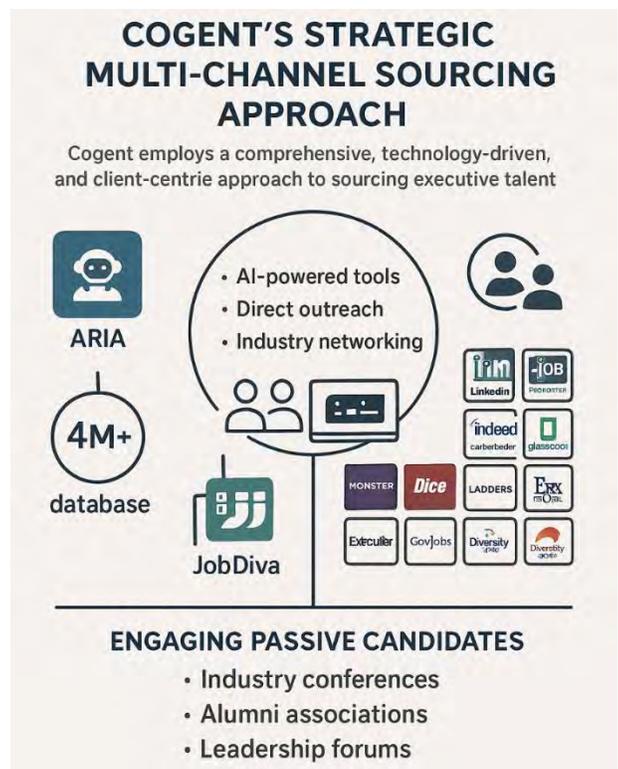
**All of our consultants have the following skills:**

- Ability to work independently.
- Basic business management skills—such as accounting, office management and customer service.
- Ability to market services.

Our consultants, through their proven background and experience, accomplish the goals and objectives of our clients. Our consultant's varied experience with multiple organizations provides an edge without undermining the capabilities of in-house staff.

**COGENT'S Strategic Multi-Channel Sourcing Approach:**

- Cogent Infotech employs a **technology-driven, client-focused, and diversity-centered** approach to executive recruitment. Our strategy blends **AI-powered sourcing tools, direct outreach, and industry networking** to identify and engage top-tier leaders who align with our clients' strategic goals and organizational culture.
- We leverage **ARIA** (Cogent's proprietary AI tool), **JobDiva** (Applicant Tracking System), and an **internal database of 4.5M+ vetted professionals**, enabling rapid access to highly qualified candidates. Our outreach extends across leading platforms such as **LinkedIn Recruiter, Indeed, Glassdoor, CareerBuilder, Monster, Dice, Ladders, ExecuNet, GovJobs, and DiversityJobs**, ensuring both reach and diversity in our candidate pool.
- Beyond digital sourcing, our recruiters actively engage in **industry conferences, leadership forums, and alumni networks** to connect with passive candidates and high-impact executives. We integrate **inclusive hiring practices** and comply with all **EEO standards**, ensuring diverse and equitable candidate slates.
- This integrated approach consistently delivers **qualified, culturally aligned executives** while reducing time-to-fill and ensuring long-term placement success.



**Key Personnel & Team Contributions**

Our executive recruitment success is driven by a **dedicated team of experts** who ensure precision in talent sourcing:

Key Personnel	Job Contribution
Manu Mehta (President & Program Manager)	Oversees executive hiring strategy and client engagement.
Casey Brinkman (Senior Director, Key Account Manager)	Manages executive talent pipelines and outreach
Senior Manager – Talent Acquisition	Leads job marketing and applicant screening
Suraj Gantayat (HR Manager)	Ensures compliance, diversity hiring, and workforce planning
Recruitment & Sourcing Teams	Utilize AI tools, job portals, and networking to source and engage top talent

In addition to leveraging **technology and networks**, we prioritize **diversity and inclusion** through **targeted outreach initiatives, affinity job boards, and veteran hiring programs**, ensuring executive placements align with **EEOC, OFCCP, and Affirmative Action** guidelines.

**Process Enhancement & Key Differentiators**

Cogent's **sourcing strategy is designed for precision, efficiency, and long-term success**. Our approach is enhanced through:

- ✚ **AI-Driven Smart Hiring** – Automated **resume parsing, candidate ranking, and predictive hiring analytics**.
- ✚ **Passive Talent Engagement** – Proactively identifying **high-potential executives** through direct outreach and leadership networking.
- ✚ **Market & Compensation Benchmarking** – Data-backed salary insights ensuring competitive hiring.
- ✚ **Comprehensive Screening & Background Verification** – SSN validation, employment history, credit checks, and security clearances.

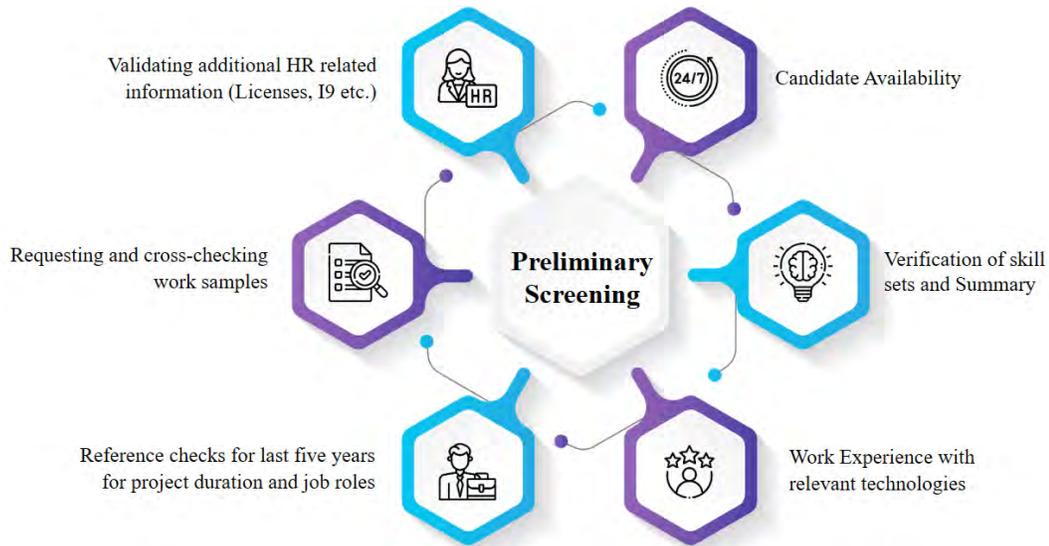
- ✦ **Employer Branding & Digital Outreach** – AI-powered job advertisements, **executive hiring webinars, podcasts, and social media campaigns.**
- ✦ **Real-Time Hiring Dashboards** – Weekly progress reports, talent analytics, and sourcing updates for stakeholders.

### Our Screening Procedure

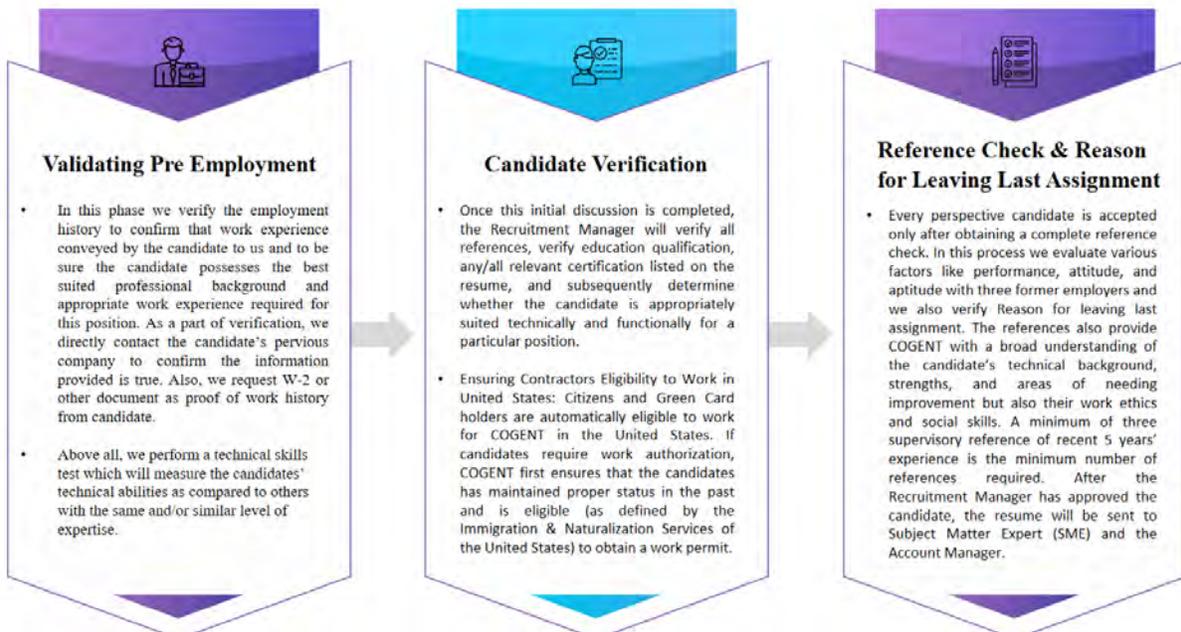
At Cogent, we use our proven 3-layered testing and screening framework to assess and validate candidates’ technical competency. Our process begins with the review of a candidate’s employment application and resume, followed by a telephone interview. We also use candidates’ social networking profiles as a tool in the screening process.

Provided below is a pictorial description of the steps we take in testing and screening candidates to ensure they possess all the necessary qualifications and skills, and are a good fit for the job profile.

#### Step 1 - Preliminary Screening



#### Step 2 - In-Depth Screening



**Step 3 - Skill Testing by Subject Matter Expert**

A Subject Matter Expert (SME) is assigned to work with a Sales/Account Executive and designated accounts to become as familiar with the account as the Sales/Account Executive and the technical environment of the client. The SME speaks with the candidate to further qualify the candidate and inform them candidate of the account details, location, project information (technical requirements, functional requirements, type of applications, team size, and other relevant technical/functional information the candidate may have questions about.). Every skill critical to the completion of assigned deliverables is identified and assessed in terms of the level of skill required (a scale of 1 to 4 is used where 1=Proficient and 4=Novice) using the below matrix. Only when it’s established that the candidate meets or exceeds the qualification of the position, the SME approves him/her for submittal to the client. Once the candidate has been approved for submittal to the client by the SME, the SME will recommend to the Sales/Account Executive to submit the candidate to the client for a requirement. Our above-mentioned manual process ensures our clients get only the best resources available in the job market. Provided below is required skill and gap plan that is utilized to evaluate each candidate before sending/assigning them to any project.

Required Skills and Skill Gap Plan						
Skill Level Required						
Required Skill	1	2	3	4	Actual Skill Level	Skill gap mitigation plan
	Proficient	Competent	Learner	Novice		
	✓	✓	✓	✓		
	✓	✓	✓	✓		
	✓	✓	✓	✓		

**COGENT’s Background Check Policy**

Cogent Infotech Corporation follows a **rigorous and standardized background check policy** to ensure that all candidates meet **ethical, legal, and professional** requirements before placement. Our background verification process is designed to mitigate risks, safeguard client interests, and maintain **workforce integrity**.



All final candidates undergo comprehensive screening, which includes:

- ✓ **Identity Verification** – SSN validation and legal identity confirmation.
- ✓ **Employment History & Education Verification** – Ensuring credentials and work experience align with the candidate’s resume.

- ✓ **Criminal Background Checks** – Federal, state, and county-level screenings to identify any prior legal offenses.
- ✓ **Credit & Financial Checks** – For roles involving financial management, audits, or fiduciary responsibilities.
- ✓ **Professional License & Certification Validation** – Confirming industry-specific qualifications.

**Drug Screening & Compliance Tests** – If required by the client or industry regulations. To ensure seamless execution and compliance, our HR & Compliance Team, led by Suraj Gantayat (HR Manager), oversees all background verification processes. Casey (Senior Account Manager) ensures alignment with client-specific requirements, while we collaborate with leading third-party screening firms such as Sterling, HireRight, First Advantage, and E-Screening to conduct in-depth screenings. These checks are performed in strict adherence to FCRA (Fair Credit Reporting Act), EEOC (Equal Employment Opportunity Commission) guidelines, and GDPR (General Data Protection Regulation) standards where applicable.

Additionally, if a client requires any additional screening beyond our standard process, such as fingerprinting, advanced security clearances, social media screening, or global background checks, Cogent will accommodate these requests to meet specific compliance and organizational needs.

**Process & Compliance Standards**

1. Candidate Notification & Consent – All candidates are informed about the screening process and must provide written authorization.
2. Verification & Investigation – Our compliance team, along with third-party screening partners, conducts the necessary checks.
3. Client-Specific Additions – Additional screenings (e.g., security clearance, fingerprinting, or drug testing) are performed as per client requests.
4. Final Clearance & Documentation – A comprehensive report is reviewed, and only cleared candidates proceed to the onboarding stage.
5. Ongoing Compliance & Audits – Periodic re-screening and compliance audits are conducted for long-term engagements.

**COGENT’s Interview Process**

Cogent follows a systematic, competency-based interview process to ensure that only the most qualified and best-fit candidates are presented to our clients. Our interview framework assesses technical expertise, leadership abilities, cultural fit, and alignment with the client’s organizational goals.

Our HR & Talent Acquisition Team, led by our Senior Manager – Talent Acquisition and Casey Brinkman (Senior Account Manager), ensures a standardized, unbiased, and data-driven approach. Additionally, Subject Matter Experts (SMEs) and client representatives are engaged in later stages for a collaborative selection process.

**Step-by-Step Interview Process**

Steps Involved	Conducted By	Process
Initial Screening & Pre-Qualification	HR Recruiters & Talent Acquisition Team	During this stage, we validate a candidate’s qualifications, experience, and role alignment while assessing communication, problem-solving, and leadership potential. Recruiters also discuss career goals, availability, and compensation to ensure mutual alignment. Qualified candidates proceed to the next stage for further evaluation.
Behavioral & Competency-Based Interview	Senior Recruiters & Hiring Managers	This stage evaluates a candidate’s soft skills, leadership capabilities, and adaptability using the STAR (Situation, Task, Action, Result) methodology. Interviewers assess decision-making, conflict resolution, and teamwork through real-world scenarios while analyzing cultural fit based on work ethics, values, and collaboration. This ensures candidates align with both technical requirements and the company’s leadership vision.
Client Interview &	Client’s Hiring Panel & Cogent’s Account Manager	In this phase, candidates meet with the client’s hiring panel for a final evaluation to ensure alignment with leadership vision, strategic goals, and organizational culture. Executives are assessed on presence,

**Final Evaluation**

stakeholder management, and long-term contribution. This serves as the final decision point before selection.

Once a candidate has been selected, our team manages the **offer negotiation, compensation discussion, and contract finalization** to ensure a mutually beneficial agreement. Additionally, we conduct **thorough reference verifications**, including past employment history and leadership recommendations, to validate the candidate’s professional background. The final step ensures a **smooth transition from selection to onboarding**, allowing the candidate to integrate seamlessly into the client’s organization.

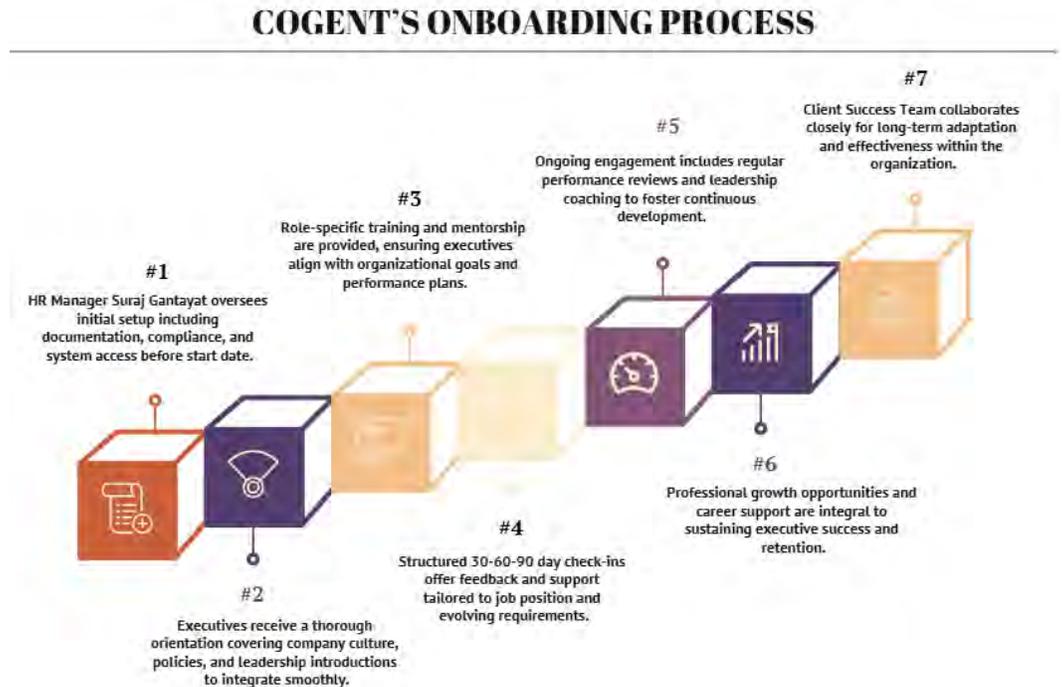
**Client-Specific Customization**

Cogent ensures **complete flexibility in the interview process** and can integrate **additional rounds or customized assessments** based on client needs. We accommodate:

- **Panel Interviews** for leadership roles
- **Video Interviews & Remote Assessments** for global candidates
- **Psychometric & Personality Tests** upon client request
- **Live Case Studies & Business Simulations** for executive-level positions

**COGENT’s Onboarding Process**

Cogent’s onboarding process ensures a seamless transition, rapid integration, and long-term success for newly hired executives. Our structured approach covers pre-onboarding, orientation, role-specific training, and continuous support to help executives adapt quickly and contribute effectively. Managed by **Suraj Gantayat (HR Manager)** and the Client Success Team, the process begins with documentation, compliance verification, and system access setup before the start date. Upon joining, executives undergo a comprehensive orientation, including company culture, policy training, and leadership introductions. They receive tailored role-specific training, mentorship, and a performance roadmap aligned with organizational goals. To ensure ongoing engagement, Cogent implements structured 30-60-90 day check-ins for feedback, role adaptation, and performance evaluation, depending upon the job position and other requirements. Post-onboarding, executives benefit from regular performance reviews, leadership coaching, and professional development opportunities, ensuring long-term success and retention.



## Depth of Capabilities

Through our expanding national network of business units nationwide, our company has helped thousands of resources find rewarding jobs with businesses ranging from high-tech startups to Fortune 100 corporations and several government agencies. Over 200+ clients rely on Cogent to strengthen their workforce with our qualified staff and each year we continue to add to our growing list of loyal customers. We specialize in providing staffing and Direct Hire services across the country, and an active talent pool of over 4.5 million qualified temporary staff from across the Country.

COGENT brings strong credentials and qualifications to deliver services sought by the NCPA. This is demonstrated by the following facts:

- **Our people**
  - We only hire the TOP 10% of technical talent.
  - Ready and operating BOT model and offshore model
  - Over 55% of our people possess master's degrees, the majority from leading US Universities.
  - One of the highest employee satisfaction ratings on Glassdoor.com.
  - 97% employee retention rate.
  
- **National Reach** - Since its inception in 2003, Cogent has been providing IT staffing services to higher education and other education clients on a national level. We can also recruit the very best talent in the World keep them or relocate them to any state in USA. We also can hire the best technical resources in our offshore office in Bangalore, India on our payroll and make them work on EdgeMarket projects remotely from India at lower costs with the same skill and technical knowledge.
  
- **Prior Experience in State of California** - Cogent Infotech Corporation has an established presence in California and has successfully delivered direct hire and Executive recruitment services to a wide range of public sector institutions throughout the state. Our current and past clients include **County of Riverside, San Mateo County, California State University, Los Angeles Unified School District (LAUSD), San Mateo County Transit District, City of Los Angeles, Office of the City Clerk, Hemet Unified School District, City of Sacramento, Housing Authority of the City of Alameda, University Of California-Irvine, Riverside Unified School District of Riverside County, Sacramento Regional County Sanitation District, County of Sacramento, Kern Health System, Alameda-Contra Costa Transit District's, CalOptima, and many others.** These engagements have included placements in educational support, technical support, project management, cybersecurity, data analytics, and administrative roles. With direct experience supporting California's regulatory frameworks, public sector hiring practices, and institutional processes, Cogent is well-positioned to deliver compliant, rapid, and cost-effective staffing solutions across the state. Our access to a robust local talent pool and familiarity with public procurement requirements ensure that we can meet the staffing needs of NCPA efficiently and with high-quality outcomes.
  
- **Pre-established talent pool of candidates** – Cogent has invested a lot of time, effort and money in customizing JobDiva ([www.JobDiva.com](http://www.JobDiva.com)), an industry-leading ATS system specifically designed for recruitment and staffing services companies. This ATS system manages the entire lifecycle of a requirement and fosters a collaborative environment between various departments within the company (recruiting, sales, human resources, administration etc.) Our ATS system currently comprises an ever-growing database of about 4.5 Million resumes of highly qualified technical talent available in the Unites States. There is a dedicated team of recruiting professionals whose sole task is to constantly keep adding to this database. We are targeting to reach a resume database size of over 5 million resumes by the end of 2025. This provides us with a competitive edge and ensures quick turnaround time.
  
- **Dedicated Office and certifications** – Cogent supports multiple universities through our several offices across United States — ensuring fast response times, direct coordination, and on-the-ground support. We are ISO 9001, ISO 20000, ISO 27001 certified and CMMI Level 3 appraised. Cogent is also a certified Minority Business Enterprise (MBE) through NMSDC supplier diversity goals while ensuring quality and compliance.

- Single Point of Contact** - Cogent maintains a team of business development professionals who serve as a single point of contact for their respective accounts. This not only ensures continuity, but also reduces the chances of miss-communication and/or confusion about who to contact. The Point of Contact for this contract will be **Mr. Manu Mehta**, who is reachable through phone at **(412) 246-0708**, or through email at [Manu.mehta@cogentinfo.com](mailto:Manu.mehta@cogentinfo.com).

- Financial Stability** - As for the financial health of our business, we are a financially strong and sound, well-funded company having direct & remote support services in various regions of the US sub-continent to deliver and implement projects on time. Our firm has a D&B PAYDEX score of 80, which shows that our firm is financially stable and well maintained. Cogent is privately held, profitable for the past 22+ years and has the financial capacity to make further investments. An official copy of our financial statements will be provided upon request.



- Current Experience** - Cogent is currently delivering Recruitment services to a wide range of state, federal, and commercial entities across the United States, including various power agencies. We have consistently embraced this competitive landscape as an opportunity to differentiate ourselves not only by offering exceptional talent, but also by doing so at a highly competitive cost. Our ability to deliver quality candidates quickly, efficiently, and within budget has earned us a strong reputation among public and private sector clients alike. This proven performance in fast-paced, multi-vendor environments demonstrates our capability to support NCPA's recruitment needs with reliability, agility, and value.
- Highly capable recruiting team** - Cogent has a highly skilled recruiting team of over 400 professionals, including recruiters, sourcing specialists, and workforce analysts. With 22+ years of experience providing recruitment solutions to public-sector entities at the federal, state, and local levels, our team has developed deep expertise in sourcing, vetting, and placing top-tier talent across a wide range of job categories — including managerial, clinical, administrative, IT, and healthcare support roles.
- Employment Standards** - Cogent is committed to being a leader in providing recruitment and direct-hire services. Therefore, it is imperative that its employees conduct their work in the utmost professional manner. Every Cogent employee is provided with an employee handbook which details all employment standards that every employee must follow.
- Access to leading recruiting tools** - Cogent invests heavily in leading recruiting tools such as LinkedIn, Monster, Dice, CareerBuilder, Glassdoor, Indeed, etc.

Cogent has all the necessary tools, capability and skills to serve NCPA throughout the contract term with top-notch talent from the market onshore or offshore as per NCPA's needs. Our rigorous testing and screening procedure will ensure that all our contractors meet or exceed NCPA's expectations throughout the contract term, as well as allow NCPA to complete projects in the specified timeline and budget.

## Timeline

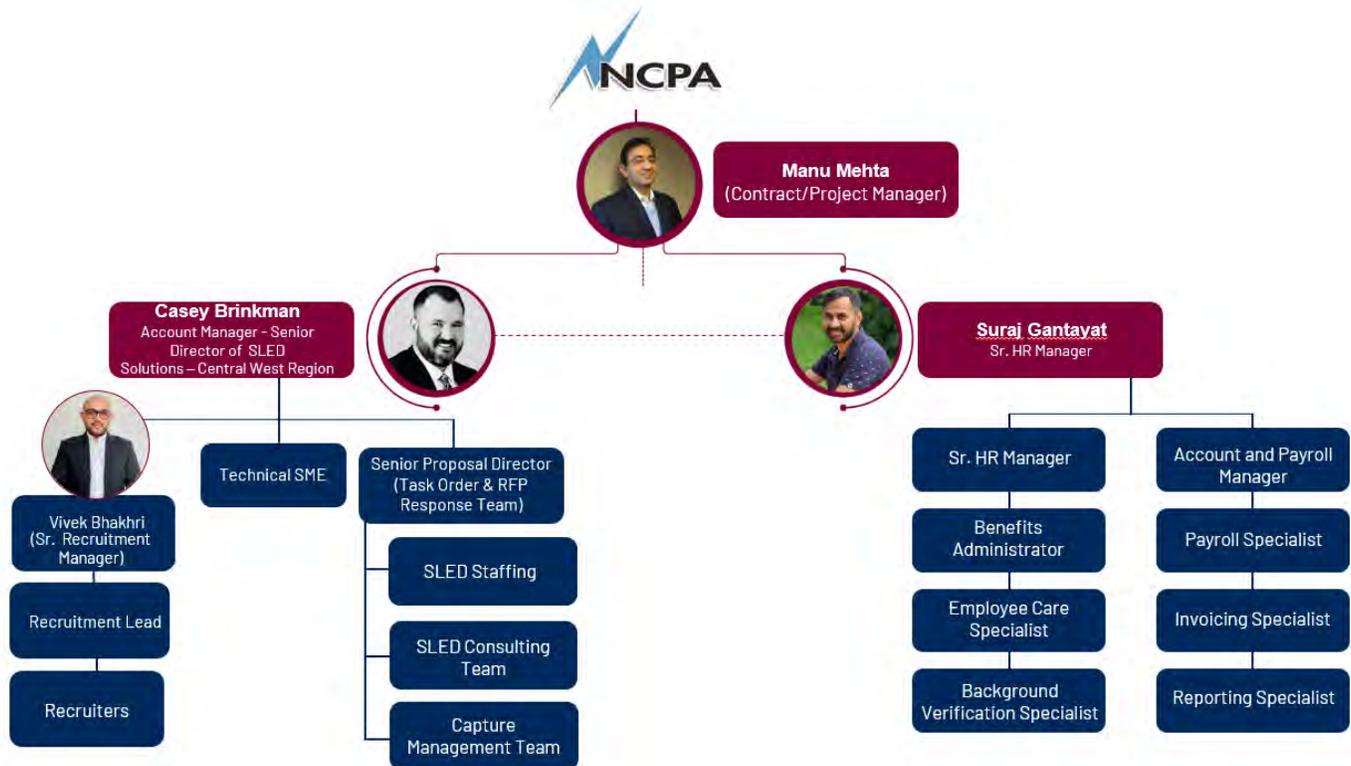
Cogent typically follows a comprehensive **90-day executive recruitment timeline** to ensure thorough sourcing, assessment, and stakeholder alignment. This extended schedule allows us to maximize candidate quality, support diversity objectives, and accommodate client availability for interviews and evaluations.

### Cogent's 90-Days Timeline

Phase	Tasks	Deliverables	Duration	Key Milestones
<b>Phase 1: Project Initiation &amp; Requirement Analysis</b>	<ul style="list-style-type: none"> <li>Conduct a detailed kickoff with NCPA.</li> <li>Define job responsibilities, organizational culture, and DEI targets</li> <li>Finalize recruitment plan, schedule, and reporting protocols</li> </ul>	<ul style="list-style-type: none"> <li>✓ Final job description</li> <li>✓ Customized search strategy</li> <li>✓ Timeline &amp; milestone tracker</li> </ul>	<b>Week 1-2</b>	Recruitment plan approved and kickoff completed
<b>Phase 2: Talent Sourcing &amp; Outreach</b>	<ul style="list-style-type: none"> <li>Launch job postings on national and niche platforms</li> <li>Conduct targeted outreach to passive talent</li> <li>Leverage diversity-focused channels and professional associations</li> </ul>	<ul style="list-style-type: none"> <li>✓ Candidate sourcing reports</li> <li>✓ Platform and outreach tracker</li> <li>✓ DEI sourcing compliance matrix</li> </ul>	<b>Week 2-4</b>	Candidate pipeline active with DEI benchmarks met
<b>Phase 3: Candidate Screening &amp; Evaluation</b>	<ul style="list-style-type: none"> <li>Preliminary screening by recruiters</li> <li>Behavioral and leadership interviews by SMEs</li> <li>Competency-based assessments and background pre-checks</li> </ul>	<ul style="list-style-type: none"> <li>✓ Candidate evaluation matrix</li> <li>✓ Interview summaries</li> <li>✓ Preliminary screening reports</li> </ul>	<b>Week 5-7</b>	Final shortlist of qualified candidates ready
<b>Phase 4: Candidate Presentation &amp; Selection</b>	<ul style="list-style-type: none"> <li>Submit top 6-8 candidates to NCPA</li> <li>Coordinate two interview rounds</li> <li>Gather stakeholder feedback and assist in selection</li> <li>Support salary negotiation and offer structuring</li> </ul>	<ul style="list-style-type: none"> <li>✓ Final candidate slate</li> <li>✓ Interview coordination log</li> <li>✓ Offer recommendation report</li> </ul>	<b>Week 8-9</b>	Final candidate selected and offer extended
<b>Phase 5: Background Verification &amp; Final Offer</b>	<ul style="list-style-type: none"> <li>Complete full background check: education, criminal, financial, references</li> <li>Finalize compensation package and secure signed offer</li> <li>Prepare onboarding checklist and transition plan</li> </ul>	<ul style="list-style-type: none"> <li>✓ Background verification report</li> <li>✓ Signed offer letter</li> <li>✓ Onboarding roadmap</li> </ul>	<b>Week 9-10</b>	Candidate cleared and offer finalized
<b>Phase 6: Onboarding &amp; Transition Support</b>	<ul style="list-style-type: none"> <li>Facilitate onboarding process</li> <li>Coordinate with NCPA HR on residency and compliance</li> <li>Conduct 30-day and 60-day check-ins to ensure retention and fit</li> </ul>	<ul style="list-style-type: none"> <li>✓ Onboarding documents-Orientation plan</li> <li>✓ Post-placement performance feedback report</li> </ul>	<b>Week 11-12</b>	Executive on-boarded and transition support initiated

## Individual Qualifications

For NCPA, we will deploy a dedicated team led by an experienced Contract/Project Manager, Mr. Manu Mehta, who will serve as the primary point of contact and ensure seamless communication and project execution. Our recruitment team comprises seasoned talent acquisition specialists, industry-focused recruiters, and workforce management experts who bring decades of combined experience in staffing and direct hire placements. Our well-trained staff combines speed and experience to find the best possible talent in the most demanding niche skill area, too. We will have a dedicated team to serve the NCPA’s requirements, who will be available to meet the NCPA’s requirements. Additionally, they will be supported by recruiters, the HR team, and other key personnel. The table and organizational chart below depict the number of employees we intend to dedicate to serving the NCPA’s account:



Entity	Professional’s Name
<b>Contract/Project Manager (Professional in charge)</b>	<b>Manu Mehta</b>
<b>Account Manager</b>	<b>Casey Brinkman</b>
<b>Recruitment Manager</b>	<b>Vivek Bakhri</b>
<b>Human Resources</b>	<b>Suraj Gantayat</b>
<b>Recruitment Lead</b>	<b>Details will be provided if requested by the NCPA</b>
<b>Technical SME</b>	
<b>Recruiters (5-6)</b>	

### COGENT’s Staff Qualifications

COGENT’s key staff team comprises highly experienced professionals specializing in Recruitment Search Services for both state government entities and private-sector clients, focusing on the selection and recruitment of qualified personnel. This team stands ready to provide skilled resources tailored to the specific requirements of various projects, ensuring timely delivery. We are committed to assisting the NCPA throughout the entire recruitment process, including the recruitment and selection of candidates for employment. Our proficient staff leverages their expertise and agility to identify the finest talent, even within the most specialized and challenging skill sets. Below is a concise overview of our key personnel and the delivery team.

In this section, we have only provided the details of team members who would serve the NCPA directly:

**Key Personnel #1**

<b>Key personnel 1 – Manu Mehta; President</b>	
<i>Name and role</i>	<b>Manu Mehta - Contract/Project Manager (Lead Contact)</b>
<p><b>Qualification / Experience</b></p> 	<ul style="list-style-type: none"> <li>Holds a Bachelor's in Mathematics and a Master's in Computer.</li> <li>Founder &amp; President with 25+ years of experience in Executive Search services.</li> <li>Leadership roles in technology, sales, strategy, and general management.</li> <li>Manu has led various public sector / government-owned engagements across the United States, delivering tailored staffing and recruitment solutions to meet the complex operational and workforce needs of housing authorities. Under his leadership, Cogent has built long-standing partnerships with clients such as <i>The Columbus Metropolitan Housing Authority, Jefferson County Metropolitan Sewer District (MSD), The Rhode Island Department of Administration Division of Human Resources, Cooperative Educational Services, Kansas Office of the Attorney General, Atlanta Housing, New York City Housing Authority, and many other clients like this.</i></li> <li>With a strong focus on servicing the California-based public sector, he has led delivery efforts for numerous high-impact contracts across the State of CA, including engagements with that similar to NCPA. Under his leadership, Cogent has built and sustained a CA-specific talent pipeline that supports administrative, IT, finance, operations and management, and engineering roles in alignment with local regulatory and compliance standards.</li> <li>Currently managing various Recruitment and Direct hire contracts, including but not limited to <b><i>The Rhode Island Department of Administration Division of Human Resources, Cooperative Educational Services, Kansas Office of the Attorney General, San Mateo County Transit District, Community Behavioral Health (CBH), Jacksonville Transportation Authority, Texas Tech University Health Sciences Center, State of Rhode Island, City of Sacramento, Seminole County, Lansing Water &amp; Light, Louisville &amp; Jefferson County Metropolitan Sewer District (MSD), State of Arizona, County Of Chester, Hamilton County, Multnomah County, Ramsey County.</i></b> and more.</li> <li>Expertise in talent change management, organizational design, compensation policy, and employee relations.</li> <li>Strong leadership, planning, and execution skills for corporate goal achievement.</li> <li>Experienced in State and Federal Government contracts, negotiations, and successful contract completion.</li> <li>Proven skills in business development, contract negotiations, and high-level service delivery.</li> <li>Effective event planning and contract-related role delegation.</li> </ul>
<p><b>Roles &amp; Responsibilities</b></p>	<ul style="list-style-type: none"> <li>Managing contracts with the NCPA and interacting with the NCPA's Appointing Authorities.</li> <li>Tracking NCPA requirements and educating Account Managers on contract specifications.</li> <li>Conducting quarterly meetings with the NCPA to monitor contract performance.</li> <li>Weekly meetings with Back Office Staffing Operations &amp; Employee Care Team for updates.</li> <li>Ensuring the timely submission of Monthly Compliance Reports to the NCPA.</li> <li>Sending weekly dashboard reports to Executive Management.</li> </ul>

**Key Personnel #2**

<b>Key personnel 2 – Casey Brinkman; Senior Director</b>	
<i>Name and role</i>	<b>Casey Brinkman - Key Account Manager</b>
<p><b>Qualification / Experience</b></p> 	<ul style="list-style-type: none"> <li>25+ years of Experience placing and recruiting upper-level professionals holding titles in areas of C-Suite, Energy and Utilities, Information Technology, Engineering, Healthcare, Manufacturing and Distribution and Construction.</li> <li>Assisting a variety of clients in many different vertices and industries with permanent Direct Hire placements with-in their organizations.</li> <li>Casey is currently the Account Manager for multiple California and Western region clients, including University of California–Irvine (UCI), Housing Authority of the City of Alameda, and San Mateo County, where he oversees all staffing operations, ensures roles are filled with top-tier candidates, and acts as the final line of candidate selection and quality assurance. He also supports strategic statewide accounts such as the State of Oregon and State of Missouri, demonstrating his ability to manage large, complex contracts with diverse requirements. He is instrumental in cross-selling Cogent's services and pursuing new business opportunities.</li> <li>He has led recruitment delivery teams and account managers.</li> </ul>

	<ul style="list-style-type: none"> <li>• Casey successfully generated new business by establishing strong client relations, driving sales, and providing top-notch customer support. He was adept at prospecting new clients and driving recruitment service sales.</li> <li>• Casey's extensive background in business development, client relationship management, and sales growth makes him an invaluable asset for the CalOptima's contract. His proven ability to identify opportunities, build lasting client relationships, and drive sales aligns perfectly with the project's objectives.</li> </ul>
<b>Roles &amp; Responsibilities</b>	<ul style="list-style-type: none"> <li>• Leads the placement and recruitment of upper-level professionals across multiple industries, including C-Suite, IT, Engineering, Healthcare, Manufacturing, and Construction.</li> <li>• Oversees recruitment delivery teams and account managers, ensuring efficient hiring processes, client satisfaction, and sustained business growth...</li> </ul>

**Key Personnel #3**

<b>Key personnel 3 -: Vivek Bakhri; Talent Acquisition, Direct Hire</b>	
<b>Name and role</b>	<b>Vivek Bakhri - Senior Recruitment Manager</b>
<p><b>Qualification / Experience</b></p> 	<ul style="list-style-type: none"> <li>• As a Director Recruiting &amp; Delivery at Cogent Infotech Corporation, Vivek delivers workforce solutions and integrated services for clients across various industries and domains.</li> <li>• With about 20 years of experience in US Staffing and working with clients in Education, IT, ERP, Engineering, Rail Transit, Retail, Federal &amp; Government, Aerospace and ITES industry, he has a unique combination of skills and knowledge that enable him to find the best talent for the most complex and challenging projects</li> <li>• Vivek, leveraging his extensive network, expertise, and market insights, helps his teams to source, screen, and place qualified candidates.</li> <li>• He also oversees the service delivery, client management, vendor management, training, and mentoring functions of his team, ensuring quality, efficiency, and satisfaction.</li> <li>• Vivek is passionate about building long-term relationships with clients, candidates, partners, and creating value for the organization.</li> </ul>
<b>Roles &amp; Responsibilities</b>	<ul style="list-style-type: none"> <li>• Serve as the primary point of contact for all candidates screened and chosen for the NCPA, building and maintaining strong, long-term relationships. Act as a trusted advisor, understanding the NCPA's business needs, goals, and challenges, and ensuring that the solutions provided align with their objectives.</li> <li>• Oversee the delivery of staffing services to the NCPA, ensuring that quality standards are met and projects are executed on time and within budget. Ensure seamless coordination between internal teams and client stakeholders to address any service gaps or issues promptly.</li> <li>• Manage relationships with third-party vendors, ensuring that they meet performance expectations and contractual obligations. Negotiate and manage vendor agreements and service-level agreements (SLAs) to optimize client satisfaction.</li> <li>• Lead and mentor recruitment teams to ensure efficient staffing operations. Provide guidance on sourcing strategies, candidate screening, and interview processes to ensure that team members adhere to best practices and meet the NCPA's expectations.</li> <li>• Track the performance of placed candidates and teams, using data-driven insights to optimize staffing strategies and improve efficiency. Regularly assess and report on key performance indicators (KPIs) and deliverables to ensure client satisfaction and meet staffing targets.</li> <li>• Develop and implement strategic plans to help the NCPA scale its workforce according to business needs. Identify opportunities for new projects or service expansion within the client account, driving additional revenue for Cogent.</li> <li>• Proactively address and resolve any issues related to staffing, performance, or service delivery. Continuously evaluate processes and recommend improvements to enhance efficiency, reduce costs, and improve client outcomes.</li> </ul>

**Key Personnel #4**
**Key personnel 4 – : Suraj Gantayat; Human Resource Manager**

<b>Name and Role</b>	<b>Suraj Gantayat – Human Resource Manager</b>
<b>Qualification / Experience</b> 	<ul style="list-style-type: none"> <li>• Extensive experience in HR management, specializing in recruitment across Education, Healthcare, Administration, and HR sectors.</li> <li>• Designs and implements recruitment strategies to address seasonal fluctuations, skill shortages, and diversity goals.</li> <li>• Utilizes networking, referrals, and direct outreach to attract top talent, including passive candidates.</li> <li>• Leads efforts to promote workforce diversity, ensuring recruitment strategies attract underrepresented groups.</li> <li>• Enhances NCPA’s employer brand through compelling marketing materials, career pages, and promotional content.</li> </ul>
<b>Roles &amp; Responsibilities</b>	<ul style="list-style-type: none"> <li>• Design and implement recruitment strategies tailored to the specific needs of the NCPA, considering factors such as seasonal fluctuations, skill shortages, and diversity goals.</li> <li>• Lead efforts to promote diversity and inclusion in recruitment practices, ensuring that the NCPA’s workforce reflects the diverse communities it serves. Implement strategies to attract candidates from underrepresented groups and foster an inclusive hiring process.</li> <li>• Enhance NCPA’s employer brand by showcasing its unique value proposition and offering compelling narratives that attract top talent. Develop marketing materials, such as career pages, brochures, and videos, to promote NCPA as an employer of choice.</li> </ul>

**Resumes of Key Personnel**

*Provided below are the resumes of the following key members from the Cogent team that will support NCPA’s contract throughout the term*

**Resume #1**

 <p><b>EDUCATION:</b></p> <ul style="list-style-type: none"> <li>➤ Bachelors in Mathematics</li> <li>➤ Masters in Computers</li> </ul>	<p style="text-align: right;"><b>Project/Contract Manager</b> #1 – Manu Mehta</p> <p><b>PROFESSIONAL SUMMARY:</b></p> <ul style="list-style-type: none"> <li>• Mr. Manu Mehta (Founder, President) brings twenty-five (25+) years of progressive techno commercial experience in the Executive Recruitment Service industry.</li> <li>• He is committed to transitioning COGENT into a leading Recruiting firm. Manu has held various leadership positions in technology, sales, strategy and general management throughout his career.</li> <li>• In the year 2018, Manu, was awarded the “BEST CEO” award by “The CEO Magazine”.</li> </ul>
<p><b>PROFESSIONAL EXPERIENCE:</b></p> <p><b>COGENT Infotech Corporation</b> <span style="float: right;"><b>Jun 2003 – Present</b></span></p> <p><u>President</u></p> <p>Mr. Manu Mehta holds a critical leadership position and plays a vital role in driving the overall success and growth of our organization. Here are the key roles and responsibilities of our President:</p> <ul style="list-style-type: none"> <li>• <b>Strategic Leadership:</b> <ul style="list-style-type: none"> <li>○ Mr. Manu Mehta provides strategic direction and vision for the organization, working closely with the executive team and the board of directors.</li> <li>○ He leads the development and execution of business strategies to achieve our mission, goals, and long-term objectives.</li> </ul> </li> </ul>	

- **Executive Management:**
  - Mr. Manu Mehta oversees the day-to-day operations of the company, ensuring the efficient execution of business plans and initiatives.
  - Work closely with the executive team, providing guidance, support, and mentorship to key leaders in various departments.
- **Business Development:**
  - He is actively involved in business development efforts, seeking new opportunities for growth, expansion, and market penetration.
  - Identify potential markets, partnerships, and strategic alliances to drive the company's market presence and revenue growth.
- **Financial Performance:**
  - He is accountable for the financial performance and overall fiscal health of the company.
  - He works with the CFO (Chief Financial Officer) and finance team to monitor financial metrics, manage budgets, and ensure profitability.
- **Innovation and Market Leadership:**
  - He fosters a culture of innovation, agility, and market leadership within the organization.
  - Also, he encourages creativity, forward-thinking, and continuous improvement to stay ahead in a competitive industry.
- **Corporate Culture and Values:**
  - He ensures that the company's actions align with its core values and ethical standards.
  - Also promote a strong corporate culture that fosters inclusivity, diversity, and a sense of purpose among employees.
- **Board of Directors Support:**
  - Manu Mehta collaborates closely with the board of directors, providing updates on the company's performance, major decisions, and strategic plans.
  - Manage work in partnership with the board to align organizational objectives and ensure effective governance.
- **Crisis Management:**
  - He leads the organization through times of crisis, making critical decisions and implementing strategies to address challenges effectively.

#### **HIGHLIGHTS OF WORK AT COGENT**

- Overall responsibility for the success of all sales-related activities. Oversee, manage, and ensure success with clients in 50 states including Federal Government, State & Local Governments, and Fortune 500 companies.
- Handling and managing contracts in the State of California.
- Heavily focused on servicing various contracts for public Sector clients.
- Responsible for delivering solutions and services to municipal administration, finance, human resources, planning, and other key government sectors
- Develop account penetration strategies to maximize our success rate with new and existing customers.
- Managing several Executive contracts for state-wide clients such as State of California, Florida, Texas, Michigan, Vermont, New Jersey, Massachusetts, to name a few.
- Managing a sales team consisting of individuals in Dallas, Pittsburgh, and internationally. Oversee recruitment and retention of consultants working within the State of California.
- Experienced consistently exceeding customer set KPIs on Executive and Talent Search contracts. Mitigating objections and compliance issues with current clients to resolve any issues. Overseeing timeframes and updating clients on projects moving through the research and development process.
- Responsible for leading the company initiatives in the Public Sector.

**Resume #2**

 cogent infotech	<b>Account Manager</b> #2 – Casey Brinkman				
<b>EDUCATION:</b>  Bachelor of Science - BS Mathematical Economics, Massachusetts Institute of Technology	<b>PROFESSIONAL SUMMARY:</b> <ul style="list-style-type: none"> <li>Casey Brinkman is a highly accomplished professional with 25+ years of experience in Executive recruitment, and business development.</li> <li>He has a proven track record of success in leadership roles, where he has consistently driven business growth, developed strong client relationships, and ensured high levels of client satisfaction.</li> <li>Known for his strategic approach and ability to deliver top talent, Casey excels in fostering partnerships and leading teams to achieve outstanding results in competitive markets.</li> </ul>				
<b>PROFESSIONAL EXPERIENCE:</b>  <table style="width: 100%; border: none;"> <tr> <td style="width: 60%; vertical-align: top;"> <b>COGENT Infotech Corporation</b>  <i>Senior Director, SLED (Account Manager)</i> </td> <td style="width: 40%; text-align: right; vertical-align: top;"> <b>April 2023 – Present</b> </td> </tr> </table> <ul style="list-style-type: none"> <li>Responsible for the success of the region, which will include multiple States and Clients (Revenue Target, Sales Targets, Strategy, Growth of the Accounts, etc.)</li> <li>Primary POC in the US for major client POC's (Primarily Leadership/Decision Makers and Key Contract POC's)</li> <li>Managing various California clients but not limited to <i>State of California - District, Alameda-Contra Costa Transit District, California Department of General Services, San Mateo County, CalOptima Health, San Bernardino County, City of Sacramento, Southern California Regional Rail Authority, San Diego Metropolitan Transit System, University of California San Francisco, Eastern Municipal Water District, Riverside County, Solano Community College District among others</i></li> <li>Providing strategic guidance to clients on market trends, salary benchmarks, and talent availability to ensure competitive positioning for executive roles while leveraging executive networks and referral programs to source passive candidates, securing a competitive edge in attracting top senior leadership talent.</li> <li>Leading account management efforts for executive services clients, including managing multiple projects, ensuring the timely delivery of qualified candidates, and achieving placement targets.</li> <li>Conducting comprehensive needs assessments with clients across executive Services to identify critical skills gaps and design strategic workforce plans that align with their business objectives.</li> <li>Managing end-to-end client relationships from initial engagement and proposal development to candidate placement and post-placement follow-up.</li> <li>Building and nurturing long-term relationships with clients in executive sectors, including Information Technology, Accounting, Finance and Human Resources to understand their unique recruitment needs and deliver tailored recruitment solutions.</li> <li>Gathering feedback from candidates and hiring managers to identify areas for improvement and implement necessary changes to enhance the candidate journey.</li> <li>Developing and executing targeted staffing strategies, including sourcing channels, advertising methods, and screening criteria, to attract top talent across various industries.</li> <li>Collaborating with internal recruitment teams to ensure alignment with client expectations, quality standards, and delivery timelines.</li> <li>Monitoring recruitment metrics and key performance indicators (KPIs) to assess the effectiveness of recruitment strategies and make data-driven adjustments as needed.</li> <li>Providing training and support to junior recruitment staff to enhance their sourcing, interviewing, and client management skills, ensuring consistent delivery of high-quality recruitment services.</li> </ul> <table style="width: 100%; border: none; margin-top: 20px;"> <tr> <td style="width: 60%; vertical-align: top;"> <b>Mastech Digital</b>  <i>Director of Business Development</i> </td> <td style="width: 40%; text-align: right; vertical-align: top;"> <b>Mar 2018 – Apr 2023</b> </td> </tr> </table>		<b>COGENT Infotech Corporation</b> <i>Senior Director, SLED (Account Manager)</i>	<b>April 2023 – Present</b>	<b>Mastech Digital</b> <i>Director of Business Development</i>	<b>Mar 2018 – Apr 2023</b>
<b>COGENT Infotech Corporation</b> <i>Senior Director, SLED (Account Manager)</i>	<b>April 2023 – Present</b>				
<b>Mastech Digital</b> <i>Director of Business Development</i>	<b>Mar 2018 – Apr 2023</b>				

- Add new direct clients or MSPs for Executive Recruitment
- Responsible for full sales cycle in bringing new clients
- Make sales presentations to new and existing customers
- Generate new executive recruitment opportunities to place candidates
- Generate new SOW opportunities
- Managed recruitment solutions for current and new clients
- Develop and implement marketing strategies to become a strategic contract executive managed solution provider to direct clients and MSPs of revenue 1billion +
- Oversee the recruiting and account management teams to deliver the customer needs
- Build long-term relationships with direct clients and helping them fill their technology resource needs and contributing to their growth
- Manage MSP account managers and recruitment team for accounts

**Prior Experience**

Client Name	Position Title	Duration
Virdis/Naztec International	Vice President of Recruiting and BD	2021-2023
Next Gen IT	Chief Growth and Strategy Officer	2018-2022
GreenKiss Staffing Solutions	National Director of Business Dev.	2014-2018
Esperer Holdings	Vice President Recruiting and BD	2008-2014
Prism Group	Vice President Recruiting and BD	2004-2008

**Resume #3**


**Director Recruitment & Delivery**  
 #3 – Vivek Bhakhri

**EDUCATION:**

Master of Business Administration (MBA) in  
 Human Resource Management

Bachelor of Computer Application (BCA)

**PROFESSIONAL SUMMARY:**

- As a Director Recruiting & Delivery at Cogent Infotech Corporation, Vivek delivers workforce solutions and integrated services for clients across various industries and domains.
- With about 20 years of experience in US Staffing and working with clients in Education, IT, ERP, Engineering, Rail Transit, Retail, Federal & Government, Aerospace and ITES industry, he has a unique combination of skills and knowledge that enable him to find the best talent for the most complex and challenging projects
- Vivek leveraging his extensive network, expertise, and market insights helps his teams to source, screen, and place qualified candidates.
- He also oversees the service delivery, client management, vendor management, training, and mentoring functions of his team, ensuring quality, efficiency, and satisfaction.
- Vivek is passionate about building long-term relationships with clients, candidates, partners, and creating value for the organization.

**PROFESSIONAL EXPERIENCE:**

**COGENT Infotech Corporation**  
Director Recruitment & Delivery

**April 2024 – Present**

- Developing and executing comprehensive recruitment strategies aligned with organizational objectives.
- Analyzing workforce needs, forecasting talent requirements, and designing effective sourcing and hiring plans to meet current and future staffing needs.
- Involved in full life cycle recruiting and account management and handling a team of over 35 recruiters.

- Responsible for hiring Executive-level and key technical candidates for important projects for Government, State & Federal agencies, Education, Transit, Engineering, Banking, Pharmaceutical, Retail, and Healthcare clients.
- Experienced in servicing healthcare clients nationwide, including state health departments, Medicaid modernization programs, public hospitals, behavioral health authorities, and managed care organizations.
- Successfully led large-scale recruitment engagements across California for public agencies and education systems, including city, county, and university clients.
- Actively managing the recruitment for public sector clients of Cogent including Metrolink, Colorado Community College System, The Dallas Independent School District (DISD), Cleveland Metropolitan School District, Stafford County Public Schools, State of Missouri, New York Power Authority (NYPA), Allegheny County, State of Missouri, City of Minneapolis, Kansas Department of Administration, Houston-Galveston Area Council (HGACBuy), San Antonio Water System, The Rhode Island Department of Administration Division of Human Resources, The State of Oklahoma, Washtenaw Community College, City of Durham, Rhode Island Airport Corporation, The North Texas Tollway Authority (NTTA), and many others.
- Expert in implementing process-based, innovative recruiting strategies and assisting the Resource Team in formulation and implementation of recruitment strategies.
- Distributed portfolios and aligned activities to achieve goals.
- Coordinated with Sales Head and Recruiting Managers to assess future recruitment needs for clients, including MSPs, Integrators, and exclusive accounts.
- Involved in intake calls with customers and working closely with hiring managers and business partners for their current staffing needs and strategic planning for upcoming/future projects.
- Involved in onboarding new employees, ensuring the new hire process is accurate and complete.
- Directed, managed, and trained staff to ensure effective organization, goal setting, and performance monitoring.

**System One Services LLC**
**May 2015 – April 2024**
*Sr. Recruiting Manager*
**Mastech Digital Resource Manager**
**Jan 2006 – April 2015**
*ERP Recruitment & Client Relationship*
System One Achievements:

- Achieved individual Gross Margin target of over \$1.2M from 2020 to 2023 and team targets by \$6.7M

Mastech Digital Achievements:

- Received the Circle of Excellence award for the years 2012, 2013 and 2014.
- Achieved Gross Margin target of \$780K for 2012, 2013 and \$525K for 2014 as compared to the target assigned of \$400K.
- Attended Oracle Open World Conferences in San Francisco, CA for the year 2013.

**Experience:**

- Overall co-ordination of ERP manpower planning, recruitment, induction & ensuring cultural fit.
- Mentoring the team related technology and other issues.
- Led a team of 13 recruiters and 3 sourcers.
- Responsible for hiring Executive level, key technical candidates for important projects for Engineering (Rail Transit), Banking, Pharmaceutical, Government & State agencies and Retail clients. ERP recruitment for key clients like Oracle Consulting Services (Commercial & Federal), IBM (Federal), Accenture, KPMG.
- Understand the technicalities of the requirement and accurately assess and analyze the requirement, needs and objectives & identify sourcing strategies.
- Sourcing and screening profiles from the jobsites, company database, Networking groups, employee referrals & vendor management.
- Sourcing profiles through social media like LinkedIn, Marketplace, Naymz, Facebook (Branch Out), Twitter and passive job boards.
- Posting attractive & eye-catching job post on groups.
- Generating employee referrals is the ideal way of recruiting and filling the roles for niche skills.
- Implementing recruitment strategies to achieve corporate management HR expansion plans through activities like Bulk recruitment drives and Campus recruitment.
- Taking firsthand feedback from the hiring team, improving the quality of resumes, coordinating with the candidates & team managers about interviews.
- Assisting candidates in framing out the point of contact assigned for them so that they can be on board in a smooth manner.

- Monthly meetings & review with all Business heads as well as with client business lead on new hiring.
- Involved in the resource management plans for bench & new hiring for upcoming projects.
- Improve the recruitment process for higher efficiency and effectiveness.
- Highly involved with the project managers and project leads as well as with the clients for employee's feedback.
- Coordinating with internal HR department for timely roll out of offer letters, sign-ups, relocation, reference checks, payments and orientations for new joiners.

### Resume #4

 cogent infotech	<b>Human Resources - Business Partner                  #4 - Suraj Gantayat</b>
<p><b>EDUCATION:</b></p> <p>Xavier Institute of Management (XIM Bhubaneswar)</p> <p>Post Graduate Diploma (MBA), Human Resources, 2012 – 2014</p> <p>Biju Patnaik Institute of Technology</p> <p>Bachelor of Technology, Electronics &amp; Telecommunications, 2002 – 2006</p> <p><b>Certifications</b>                  OKR Expert - WorkBoard Inc.</p>	<p><b>PROFESSIONAL SUMMARY:</b></p> <ul style="list-style-type: none"> <li>• As a seasoned Senior HR Business Partner with over 13 years of experience primarily with Executive teams in multiple industries across the United States and India.</li> <li>• Collaborates with leadership to design and implement innovative HR programs that enhance employee engagement, promote positive company culture, and drive business objectives.</li> <li>• Suraj's goal is to leverage his expertise in talent management, organizational development, people analytics, and strategic business partnering to drive the growth and success of a dynamic organization.</li> </ul>
<p><b>PROFESSIONAL EXPERIENCE:</b></p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="105 1176 617 1470"> <p><b>Cogent Infotech Corporation</b>  <i>Human Resources Business Partner</i>                      Tools and Methodologies- JobDiva, ADP</p> <ul style="list-style-type: none"> <li>• HR Head with a team of 9 managing 700+ exempt and non-exempt employees across the United States.</li> <li>• Responsible for human resource strategies and programs, including employee engagement, employee relations, and compensation &amp; benefits.</li> <li>• Partner with senior management to understand business strategies, diagnose current organization performance, and develop/implement plans to build organization capabilities and support continued business growth.</li> <li>• Collaborate effectively and influence peers, other leaders, and senior management in making business decisions.</li> </ul> </div> <div data-bbox="1266 1176 1510 1218" style="text-align: right;"> <p><b>Jun 2023 – Present</b></p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div data-bbox="105 1491 617 1879"> <p><b>Senior Manager, Samsung Semiconductor</b>  <i>Sr. Recruiting Manager</i>                      Tools and Methodologies- Workday, JIRA, ZVOLLV, QuickFMS, TWILIO</p> <ul style="list-style-type: none"> <li>• Revised org structure, added product lines, and created horizontals leading a cross-functional team of 10+.</li> <li>• Collaborated with MD for alignment with business goals. Resulted in 50% growth in 2 years.</li> <li>• Recruited 20+ Directors and Associate Directors to form the revamped core leadership group.</li> <li>• Delivered Speak Easy, a coaching program for new leaders using the Johari Window framework to promote transparent and sustainable relationships with teams and key members. Achieved 8.3/10 feedback score from 150+ participants.</li> <li>• Developed and administered a new hybrid framework for the \$3M merit salary increase budget to give leaders controlled autonomy and thereby the ability to further merit and manage employees in critical roles.</li> <li>• Implemented a structured engagement and retention process focused on manager 1-1's, top talent connects, and focused group discussions, resulting in a 5-percentage-point reduction in attrition vs. the previous year</li> </ul> </div> <div data-bbox="1242 1491 1510 1533" style="text-align: right;"> <p><b>Sep 2020 – Mar 2023</b></p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div data-bbox="105 1900 373 1974"> <p><b>Jio Platforms Limited</b>  <i>Senior Manager</i></p> </div> <div data-bbox="1242 1900 1510 1942" style="text-align: right;"> <p><b>Oct 2018 – Sep 2020</b></p> </div> </div>	

**Tools and Methodologies – SAP, Workboard (for OKR's)**

- Managing a team of 2 to lead HRBP & Rewards for 500+ employees and People Programs for 2000+ employees.
- Built and executed talent management strategy leading a team of 4 improving the internal engagement score from 3.9 to 4.3 and on Glassdoor (for Ajio) from 2.3 to 3.5.
- Implemented a 100 Integration Plan and transitioned it to a virtual medium during COVID-19. Reduced infant attrition by 30%, with a consistent 7.8/10 feedback score. Program adopted to 6000+ employees.
- Designed and implemented a Long-Term Incentive Plan framework to retain high-performing mid-management employees, successfully retaining at least ten critical employees.
- Collaborated with Jio Platforms' Office of the President to successfully establish a cutting-edge 5000-seat office in Bangalore. Utilized innovative physical and digital strategies resulting in completion, 13 months ahead of schedule.
- Headed a team of 20+ members to develop an ongoing talent branding strategy for 'AJIO' in collaboration with the President of Reliance Retail, with a \$100k/year budget.
- Engaged with an external agency and successfully launched the brand's outreach pages on LinkedIn, Facebook, and Instagram, resulting in a massive following of over 60k in just 3 months.

**Accenture**
**Nov 2015 - Oct 2018**
Specialist
**Tools and Methodologies – SAP, Success Factors, Power BI, Design Thinking**

- Leading a team of 2 to manage Talent Strategy for 65000+ employees.
- Created an employee experience that consistently achieved an eNPS score of >30. Updated the yearly action planning by applying sentiment analysis to open-ended questions.
- Led a team of 200+(in 4 countries) to create the flagship event 'BeOperationsTruly Human Carnival', focused on uplifting Body, Mind, Heart, and Soul, impacting over one hundred thousand employees.
- Led the change management journey for implementing an on-demand Gallup Q12, replacing the annual Pulse Survey with 70% adoption and 30k+ action plans by Year 2.
- Revamped the recognition framework, increasing utilization from 40% to 65% of the \$1M budget by creating a more personal structure.
- Part of the team that delivered the successful launch of the employee-facing machine learning chatbot, DiPA.

**ITC Infotech**
**Apr 2014 - Oct 2015**
Manager
**Tools and Methodologies - SAP**

- Successfully developed and implemented people strategies across three distinct businesses.
- Designed and implemented a tailored incentive program for Project Managers and Architects, resulting in a 3% reduction in attrition over 2 years.
- Led a team of four to streamline global performance management processes, reducing closure and reward dispensation timelines by 2 months.
- Part of the core team of 3 delivering the \$130k Talent Appreciation Program (TAP'14), with virtual integration for teams in North America and the UK.

**Mastech Digital**
**Jun 2008 – May 2012**
Senior Executive Human Resources
**Tools and Methodologies – PeopleSoft (Admin)**

- HR Generalist for 500+ employees in the United States.
- Managed strategies and programs in areas such as recruitment, employee relations, compensation & benefits, training & development, immigration, and compliance.
- Handled the entire employee life cycle from onboarding to exits.
- Led the team responsible for generating reports on monthly staff turnover, headcount, absenteeism, and other management reports.
- Created an employee handbook from scratch, reducing employee queries by 50%.
- Worked with the Director-HR to lead a cost reduction exercise for 90+ employees of our largest client.
- Served as the HR team SME to lead the migration of PeopleSoft 9.0 to 9.1.

## Fee Proposal

*The Flat Fee for the services or a Fee Estimate estimating the number of hours required to provide the Services, the billing rates of the persons proposed to provide the Services, and any other estimated costs including travel, overhead, printing, administrative and other charges for completing the work. Proposal should specify billing procedures and method of payment. Prices quoted in the proposal shall be firm prices not subject to increase during the term of the agreement. If a quoted price is subject to expiration, the expiration date shall be noted.*

**Cogent's Response:** Cogent proposes to perform the Executive Recruitment Services for the selection of NCPA's next General Manager on a fixed fee basis of **\$45,000**.

The total fixed fee of **\$45,000** will be invoiced based on the following schedule:

- **10% (\$4,500)** — invoiced **upon project kickoff** (start of initial search activities).
- **90% (\$40,500)** — invoiced **upon successful placement or after the selected executive's start date**, whichever comes first.

## References

### Reference - 1

<b>Name of the Organization</b>	<b>State of Rhode Island, DOA</b>
<b>Name and title of Contact person</b>	Kayla Weststeyn - Chief of Staff
<b>Address</b>	One Capitol Hill, Providence, RI 02908
<b>Phone</b>	(401) 391-3939
<b>Email address</b>	<a href="mailto:Kayla.Weststeyn@doa.ri.gov">Kayla.Weststeyn@doa.ri.gov</a>

### Reference - 2

<b>Name of the Organization</b>	<b>North Texas Tollway Authority, TX</b>
<b>Name and title of Contact person</b>	Angela Nguyen - Recruiting Manager
<b>Address</b>	39025 LBJ Service Road
<b>Phone</b>	(214) 461-2079
<b>Email address</b>	<a href="mailto:angelan@ntta.org">angelan@ntta.org</a>

### Reference - 3

<b>Name of the Organization</b>	<b>Office of the Kansas Attorney General</b>
<b>Name and title of Contact person</b>	Leslie Gish - Human Resources Director
<b>Address</b>	120 SW 10th Ave., 2nd Floor Topeka, KS 66612
<b>Phone</b>	785-296-3716
<b>Email address</b>	<a href="mailto:leslie.gish@ag.ks.gov">leslie.gish@ag.ks.gov</a>

## Other Information

### Value Added Services: Elevating Talent Acquisition

- 01



**Cogent's ARIA harnesses AI for best talent matching.**  
Cogent's ARIA utilizes AI to enhance candidate matching.
- 02



**Dedicated account management for each project.**  
Each project is supported by a dedicated account management team.
- 03



**Diversity outreach is a key priority.**  
Prioritizing diversity sourcing via DEI networks.
- 04



**Flexible Solutions**  
Cogent offers short-term (7-14 day) advertising campaigns ideal for clients with limited budgets seeking targeted candidate outreach.
- 05



**Cogent guarantees replacements for poor hires.**  
Cogent provides a replacement guarantee for underperforming hires.
- 06



**Legal experts ensure hiring compliance.**  
Compliance is ensured by in-house legal and HR experts.
- 07



**Finalist briefs provide detailed profiles.**  
Finalist submissions include comprehensive candidate briefs with skills assessments and interview insights to aid decision-making.
- 08



**Recruitment Audit**  
Cogent customizes its services by analyzing the client's talent acquisition processes and recommending optimized sourcing and recruitment strategies.
- 09



**Cogent offers payroll for selected candidates.**  
Cogent handles payroll for chosen candidates.
- 10



**Short-term job postings available for clients.**  
Short-term job posting campaigns are available for budget clients.

## Acknowledgement

*The proposer shall certify that it takes no exception(s) to this RFP, including, but not limited to, NCPA's Consulting Services Agreement, included as Appendix A. If the proposer does take exception(s) to any portion of the RFP and/or Consulting Services Agreement, the specific exception(s) shall be identified and explained. NCPA is not required to negotiate with proposer or to accept any items to which any proposer takes exception. Make sure you review the insurance requirements in detail and that you are willing to accept the MTCSA.*

**Cogent's Response:** Cogent has carefully reviewed the **NCPA Request for Proposals** and the **Model Consulting Services Agreement (MTCSA), including all insurance requirements**. We hereby certify that we take **no exceptions** to the terms, conditions, or requirements outlined in the RFP and Appendix A. Cogent acknowledges and accepts the MTCSA in its entirety and confirms our ability and willingness to comply with all stated insurance requirements, contract obligations, and performance expectations.

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## Safety Compliance



### CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
09/10/2025

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<b>INSURED</b>  ADP TotalSource FL XVII, Inc. 5800 Windward Parkway Alpharetta, GA 30005 L/C/F: Cogent Infotech Corporation DBA Cogent Infotech 1035 BOYCE RD Ste 108 Pittsburgh, PA 152410000	

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DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 All worksite employees working for Cogent Infotech Corporation DBA Cogent Infotech paid under ADP TOTALSOURCE, INC.'s payroll, are covered under the above stated policy. Proprietor/Partner/Executive Officer/Member are not excluded as long as they are in the ADPTS payroll or have completed the SEI Participation Addendum.

**CERTIFICATE HOLDER**

**CANCELLATION**

Northern California Power Agency 651 Commerce Drive Roseville, CA 95678	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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# J. Powers

## RECRUITING, INC.

A member of the Sanford Rose Associates® network of offices.

Executive Search Proposal for:  
*Northern California Power Agency*  
*(NCPA)*

*General Manager*

*September 18, 2025*

Main Point of Contact: Jennifer Powers  
Phone or text: (916) 304-6661  
Email: [Jennifer@JPowersInc.com](mailto:Jennifer@JPowersInc.com)  
6120 W. 6<sup>th</sup> Street  
Rio Linda, CA 95673

**BE HEARD. GET RESULTS.**

A member of the Sanford Rose Associates® network of offices.



September 18, 2025

Bryna Bryant, Human Resources Manager  
Northern California Power Agency (NCPA)  
Email: Bryna.Bryant@ncpa.com

**Subject: Executive Search Proposal - General Manager Position**

Dear Ms. Bryant,

With great appreciation and continued enthusiasm, we are pleased to submit our proposal to lead the recruitment for the **General Manager** position for the Northern California Power Agency (NCPA). We are honored by the opportunity to once again partner with NCPA on a critical leadership search—one that carries high visibility and long-term impact.

Since our first engagement in 2015 with the placement of Jacob Eymann, our relationship with NCPA has evolved into a trusted, collaborative partnership—one grounded in shared values, mutual respect, and a consistent track record of success. Over the years, we've had the privilege of supporting your team in identifying and placing exceptional talent in key roles, and we take pride in the lasting impact those hires have made. In addition, we have successfully worked with numerous members of NCPA including Silicon Valley Power and City of Palo Alto Utilities.

Our connection with NCPA, especially through our close working relationship with Jenna Flanagan, our Senior Executive Recruiter, has made each engagement not only effective but truly enjoyable. The chemistry between our teams has fostered an environment of transparency, aligned expectations, and a shared commitment to excellence.

The search for your next General Manager is more than a placement; it's a defining moment. We recognize the responsibility and visibility of this role, and we approach it with the seriousness and strategy it deserves.

At JPR, we've specialized in executive recruiting for two decades, with deep experience in public-sector leadership, utilities, and mission-driven organizations. We don't rely on job postings to surface candidates. We proactively source, engage, and recruit top-tier passive talent, those who are thriving in their current roles and aren't actively on the market.

While larger firms may offer scale, we offer precision. When you hire JPR, you get myself and Jenna, not junior associates or outsourced resources. We've worked together since 2007, and we will personally lead every aspect of this search from kickoff to candidate onboarding.

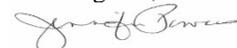
JPR is committed to advancing Diversity, Equity, and Inclusion (DEI) throughout the recruitment process. Our approach begins with intentional sourcing and outreach to ensure candidates from a broad range of backgrounds, experiences, and perspectives are included. We don't stop at a diverse candidate slate; our goal is to help NCPA identify and attract leadership that reflects the communities you serve and strengthens your organizational culture.

Why JPR? At the heart of our work is trust. Our clients and candidates consistently tell us they value our honesty, responsiveness, and professionalism, and yes, even our kindness. We believe that executive search can be both strategic and human. It doesn't need to feel cold or corporate; it can be collaborative, transparent, and even in high-stakes situations, genuinely positive.

We would be honored to lead this search and help NCPA identify a visionary, values-driven General Manager who will carry your mission forward: To provide reliable, cost-effective, and environmentally responsible energy and services to your member communities.

Please feel free to contact me directly at (916) 304-6661 if you have any questions or would like to discuss our approach further. We are grateful for the trust you've placed in us over the years and excited about the opportunity to build on our shared success.

Best Regards,



Jennifer Powers, President/Owner  
Attached: Proposal

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## SCOPE OF WORK

### J Powers Recruiting, Inc. (JPR) - Scope of work and Time Schedule for the GENERAL MANAGER search:

#### 1. Work and Communicate with Staff and Others (Week 1)

JPR will collaborate closely with the Executive Committee at NCPA throughout all phases of the **General Manager search and selection process**. JPR will serve as a strategic partner, ensuring that all recruitment activities are aligned with NCPA's goals and expectations.

- **Regular Communication:** Begin by meeting with the Executive Committee to develop a candidate profile and recruitment strategy using a comprehensive Needs Analysis Profile. Maintain clear, consistent communication throughout the search, providing regular updates on progress, key milestones, and any emerging challenges or opportunities.
- **Meeting Participation:** Hold a kickoff meeting with all stakeholders from NCPA and JPR, either via conference call, facilitated by **Jennifer Powers, President**, and **Jenna Flanagan, Project Manager, our lead Senior Executive Recruiter**. The goal is to finalize the Needs Analysis Profile and establish a clear, collaborative roadmap for the search process. During this meeting, we will:
  - Confirm roles, responsibilities, and timelines.
  - Clarify each step of the hiring process.
  - Review and finalize the draft **Search Project Schedule (Exhibit A)**.
  - Set dates for weekly updates, candidate presentations to NCPA, phone interviews, and in-person interviews.
- **Stakeholder Engagement:** Facilitate communication and coordination between NCPA staff, stakeholders, and other involved parties to ensure transparency and alignment.
- **Confidentiality Assurance:** Exercise strict confidentiality throughout the process to protect candidate privacy, maintain the integrity of the search, and uphold NCPA's professional standards.
- **Documentation and Reporting:** Prepare and deliver detailed reports, summaries, and recommendations at each phase to support informed decision-making by the Executive Committee.

J Powers Recruiting, Inc. will act not only as a recruiter but also as a trusted advisor, guiding NCPA through a comprehensive and inclusive search process designed to identify and secure a highly qualified and visionary General Manager.

#### 2. Develop a Position Profile and Outreach Plan (Week 2-3)

JPR will lead the development of a comprehensive and strategic position profile for the General Manager role at NCPA. This profile will be crafted in close collaboration with the Executive Committee and key stakeholders to ensure it accurately reflects the responsibilities, qualifications, leadership attributes, and organizational expectations for the position.

- **Stakeholder Engagement:** Conduct interviews or surveys with NCPA leadership, staff, and Commissioners to gather input on the desired qualities and priorities for the General Manager.
- **Position Profile Development:** We will create a professionally designed brochure to market the opportunity to top-tier candidates. It will showcase the organization's mission, leadership, priorities, and culture, while clearly outlining role expectations and qualifications.
- **Outreach Strategy Design:** Develop a robust outreach plan tailored to attract a diverse and highly qualified pool of candidates. This plan will include:
  - Targeted advertising in industry-specific publications and platforms.
  - Outreach to professional associations, leadership networks, and diversity-focused organizations.
  - Use of social media, digital marketing, and firm-specific channels to maximize visibility.
  - Post on the JPR and NCPA websites.
  - Industry-specific job boards that NCPA has NOT already posted. To be determined.
- **Benchmark Activities:** Establish clear benchmarks and timelines for outreach efforts, including dates for posting the position, initial candidate review, and progress reporting.
- **Inclusive Recruitment Practices:** Ensure that all outreach efforts are designed to promote equity and inclusion, with a focus on reaching underrepresented groups and innovative leaders in the utility and public agency sectors.

JPR will ensure that the position profile and outreach plan are not only aligned with NCPA's strategic goals but also positioned to attract candidates who bring vision, experience, and commitment to public service.

### 3. **Develop Selection Criteria (Week 3)**

We will work closely with the Executive Committee to define clear, measurable, and role-specific selection criteria. This includes:

- Reviewing the job description and organizational context.
- Identifying core competencies, leadership attributes, and performance expectations.
- Ensuring criteria reflect NCPA's commitment to diversity, equity, and inclusion.

### 4. **Identify a Diverse Group of Applicants (Week 3)**

Our sourcing strategy will prioritize diversity and inclusion by:

- Conducting outreach at national, regional, and local levels.
- Engaging both active job seekers and paying particular attention to the "passive job seekers".
- Leveraging networks, professional associations, and diversity-focused platforms.

### 5. **Targeted Outreach (Week 3)**

We will implement a multi-channel outreach strategy that includes:

- Direct engagement with professionals in public agencies, Community Choice Aggregators (CCAs), and similar utility entities.
- Use of proprietary databases, firm contacts, and executive networks.
- Distribution of candidate questionnaires to assess interest and alignment.

### 6. **Candidate Landing Page (Week 3)**

To streamline access and maintain confidentiality:

- A password-protected landing page will be created to house all candidate materials in one centralized, confidential location.
- Executive Committee members and designated staff will have exclusive access to review resumes, candidate profiles, interview notes, and assessment results at their convenience, supporting informed and timely decision-making.

### 7. **Execute Candidate Search (Weeks 4-7)**

Our search process will be strategically aligned with the finalized position profile to ensure we attract the most qualified and well-matched candidates. This includes:

- Targeted outreach and candidate engagement to identify and connect with individuals who possess the desired qualifications and align with the organization's mission and culture.
- Collaboration with the Executive Committee to review and refine the candidate pool, ensuring a shared understanding of priorities and preferences.
- Continuous feedback loops throughout the process to maintain alignment, address emerging needs, and adjust the strategy as necessary to achieve the best outcome.

### 8. **Screen Candidates and Provide Profiles (Weeks 8-9)**

We will conduct thorough screenings and interviews to assess each candidate's qualifications, experience, and cultural fit with the organization. Deliverables will include:

- Our goal is to identify approximately five (5+/-) well-vetted, motivated candidates who fall within the established salary range and timeline. Each will be selected based on their demonstrated strengths, relevant background, and clear alignment with the position requirements.
- Supporting materials, including resumes, cover letters, and results from preliminary assessments, provide a well-rounded view of each candidate.
- Source a list of 300+ targeted, potential, diverse candidates, and will encourage interested candidates to apply for the position.
- Present the opportunity to everyone on the list.
- If we are unsuccessful in speaking to each candidate, we leave at least 2 voicemails.
- Send bulk emails/ LinkedIn messages to this same list with a brief written presentation of the opportunity.
- If necessary, we will add more targeted candidates to the list.

### 9. **Candidate Interviews and Assessments (Weeks 10-11)**

We will support the interview process by:

- Designing structured interview questions aligned with selection criteria.
- Coordinating interview logistics and panel participation.
  - o JPR Team will handle the facilitation and coordination of the interview process from beginning to end with all participants.
  - o Coordinate the in-person / phone / Zoom interview.
  - o Prepare and debrief the candidate and NCPA.
  - o Prepare and debrief the candidate and NCPA.

- Facilitating candidate assessments, including leadership and behavioral evaluations.
  - Give them the assignment to test their motivation, in the form of written answers to questions about the position. If they complete it, it shows motivation and gives a sample of their writing skills.
  - JPR will ensure and verify that candidates are authorized to work in the U.S.

#### 10. Perform Reference and Background Checks (Week 12)

For final candidates, we will conduct:

- Comprehensive reference checks with former supervisors and colleagues.
  - JPR to conduct all reference checks – a minimum of 3 professionals for each finalist.
  - To be done after the first interview and before setting up face-to-face.
  - Send reference check reports to NCPA.
- Background checks, including employment verification, litigation history, and publicly available records.
  - Background checks, degree, and employment verification, etc., to be conducted by JPR (to be agreed upon by NCPA).
- Optional third-party screening services as requested.

#### 11. Final Selection of Candidate (Week 13)

We will assist with the final selection process by:

- Facilitating Executive Committee deliberations.
  - Present candidates to NCPA, including the Complete Candidate Presentation, a summary of the Qualifying Candidate Form, resume, written assignment, candidate information sheet, and other concerns.
  - JPR will use the Candidate Ranking Sheet to provide insights and make recommendations on the candidates.
  - Develop and deliver written reports to NPCA. The Status Report will highlight the results of the recruitment and subsequent screening interviews.
- Supporting offer development and negotiation.
  - JPR is dedicated to facilitating the candidate's acceptance of the job offer from NCPA and commencing work on the agreed-upon start date.
- Advising on retention strategies to ensure long-term success.

#### 12. Consult with NCPA General Counsel (Week 14)

We will coordinate with NCPA's General Counsel to:

- Review employment contracts and legal documentation.
- Ensure compliance with applicable laws and organizational policies.

#### 13. Transition Activities (Week 15)

To support a successful onboarding, we will:

- Develop a transition plan in collaboration with NCPA leadership.
  - JPR aims to smooth the candidate's transition to NCPA by thoroughly assessing their readiness to relocate to California. JPR will provide the candidate with our relocation toolkit, detailing community demographics, economic conditions, cost of living analysis, salary comparisons, estimated moving costs, home values, etc.
- Provide onboarding resources and coaching as needed.
  - Moreover, JPR will clarify the candidate NCPA's work policies regarding onsite, hybrid, and remote work schedules.
- Monitor early performance and integration.

#### 14. Failed Search Mitigation – (Week 16)

In the event of a failed search, we will:

- Activate a contingency plan at no additional cost.
- Reassess the position profile and outreach strategy.
- Relaunch the search with revised parameters and timelines.

#### 15. Other Relevant Activities

To enhance the search process, we will:

- Implement strategies to increase candidate diversity and innovation.
- Provide market insights and benchmarking data.
- Offer optional services such as relocation support and executive coaching.

## A. EXECUTIVE SUMMARY

**J Powers Recruiting, Inc. (JPR)** is pleased to submit this proposal in response to the **Northern California Power Agency (NCPA)** Request for Proposal for Executive Recruitment Service Providers. Our firm brings a proven track record of success in identifying, attracting, and placing top-tier executive talent across a wide range of industries and public sector organizations. We understand the unique challenges and opportunities associated with executive recruitment and are committed to delivering customized, high-quality services that align with NCPA's strategic goals.

Our approach is rooted in a deep understanding of organizational culture, leadership competencies, and market dynamics. We leverage a robust network of professionals, advanced sourcing technologies, and a rigorous vetting process to ensure that each candidate meets the highest standards of excellence. Our services include needs assessment, candidate sourcing, screening and evaluation, interview coordination, and onboarding support.

### Highlights of our proposal include:

- A proven methodology for executive recruitment, including stakeholder engagement, market research, candidate sourcing, and selection.
- A dedicated recruitment team with extensive experience in public sector executive searches.
- A comprehensive and transparent recruitment process tailored to NCPA's needs.
- Commitment to diversity, equity, and inclusion in all candidate sourcing and selection efforts.
- Flexible service models and competitive pricing structures are designed to meet the needs of NCPA members.

We are confident that our expertise and personalized approach will provide exceptional value to NCPA and its members.

### Proposer Information

#### 1. Legal Name and Address of Proposer

J Powers Recruiting, Inc.  
6120 W. 6<sup>th</sup> Street, Rio Linda, CA 95673

#### 2. Legal Form of Proposer

JPR is an S-Corp

#### 3. Address(es) of Office(s) Involved in Providing the Services

Mailing address: 6120 W. 6<sup>th</sup> Street, Rio Linda, CA 95673  
Office address: 1972 Del Paso Road, Suite 155, Sacramento, CA 95834

#### 4. Contact Information

Jennifer Powers  
President  
6120 W. 6<sup>th</sup> Street, Rio Linda, CA 95673  
(916) 304-6661 / [jennifer@jpowersinc.com](mailto:jennifer@jpowersinc.com)

#### Lead Staff Person for Services:

Jenna Flanagan  
Senior Executive Recruiter and Project Manager for this search  
(916) 304-6663 / [jenna@jpowersinc.com](mailto:jenna@jpowersinc.com)

Jenna's team:

- Jennifer Powers                      President, Senior Executive Recruiter
- Aaron Mielke                          Executive Recruiter
- Jeremy Dohoney                      Executive Recruiter
- June Whited                            Associate Recruiter & Sourcing
- Gina Academia                        Executive Assistant, Researcher & Sourcing
- Allison Krsak                          Researcher & Sourcing

## **B. PROPER'S QUALIFICATIONS**

### **Qualifications and Experience**

JPR is a premier executive search firm with over two decades of specialized experience in executive recruitment and leadership consulting. Since our founding in 2012, we have successfully partnered with both public and private sector organizations to identify and place top-tier leadership talent.

Our firm is independently owned and proudly certified as a **100% Woman Business Enterprise (WBE)** and **Small Business Enterprise (SBE)**. We are also a **California-certified Small Business and Disabled Veteran Business Enterprise (DVBE)**, Certification No. **1758261** and **DGS CMAS number 4-25-07-1021**.

JPR is recognized for its strategic, full-service approach to executive search, with a strong emphasis on integrity, discretion, and results. Our team of seasoned recruiters has led high-impact searches for executive roles across a wide range of industries and government entities. We are deeply committed to promoting diversity, equity, and inclusion, consistently delivering candidate pools that reflect a broad spectrum of backgrounds and perspectives.

### **Relevant Industry Experience**

JPR has direct experience in staffing for roles similar to those outlined in this contract, including:

- Chief Operating Officer at the City of Palo Alto
- Director of Silicon Valley Power at the City of Santa Clara, Silicon Valley Water
- Chief Operating Officer at the City of Santa Clara, Silicon Valley Water
- Executive Director at the California Public Utilities Commission
- Environmental Services Director at the City of San Jose

Each placement was executed within the expected hiring timeline and met or exceeded client expectations in terms of candidate quality and retention.

### **References and Testimonials**

JPR offers a roster of verifiable references from clients in both the public and private sectors. Written testimonials are available upon request, and we are happy to coordinate reference calls to validate our performance and professionalism.

### **Staffing Capacity**

Our recruiting team consists of five (5) full-time recruiters supported by a candidate database of over 70,000 active professionals. We utilize an industry-leading Applicant Tracking System (ATS) to streamline the sourcing, screening, and compliance processes. This allows us to scale rapidly to meet high-volume hiring needs without compromising quality or speed.

### **Strategy and Methodology**

Our approach is designed to ensure a thorough, inclusive, and strategic process for identifying and selecting the ideal candidate for the General Manager role. Each phase is tailored to align with organizational goals, leadership expectations, and cultural values.

#### **1. Developing a Comprehensive Profile for an Ideal Candidate**

We begin by engaging in detailed consultations with the Executive Committee and other key stakeholders. These conversations are aimed at uncovering:

- The organization's strategic direction and long-term goals.
- Leadership competencies required to drive success.
- Cultural dynamics and values that define the workplace.

Through structured interviews and stakeholder surveys, we synthesize this input into a robust candidate profile. This profile outlines the desired leadership style, core competencies, and alignment with the organization's strategic vision, serving as the foundation for all subsequent steps.

#### **2. Recommending Revisions to the Job Description**

Upon request, we will conduct a thorough review of the existing General Manager job description. Our goal is to ensure it reflects:

- The updated candidate profile.
- Current industry standards and expectations.

- Inclusive and equitable language.
- Performance-based criteria that support measurable outcomes.

We provide clear, actionable recommendations to enhance clarity, relevance, and appeal to top-tier candidates.

### 3. **Designing and Implementing an Effective Recruitment and Search Strategy**

We deploy a multi-channel recruitment strategy that maximizes reach and impact. This includes:

- Targeted outreach to industry leaders and passive candidates.
- Digital advertising across high-visibility platforms.
- Engagement with professional networks and diversity-focused organizations.

Leveraging our proprietary database and national network, we identify and engage candidates who may not be actively seeking new roles but align closely with the ideal profile.

### 4. **Work with the Executive Committee in the Screening Process and Candidate Evaluation**

In partnership with the Executive Committee, we design a rigorous and transparent screening process. This includes:

- Systematic resume reviews.
- Preliminary interviews focused on key competencies.
- Customized assessments to evaluate leadership potential.

We provide detailed candidate dossiers that include professional history, leadership achievements, and preliminary reference insights to support informed decision-making.

### 5. **Assisting the Executive Committee in the Interview and Selection Support**

We facilitate structured interview panels and provide tailored interview guides that are aligned with the candidate's profile. Our recruiters will:

- Assist in evaluating candidate responses.
- Ensure consistency and fairness throughout the process.
- Remain available to advise on best practices and selection criteria.

This collaborative approach ensures alignment with organizational values and strategic priorities.

### 6. **Provide Independent Evaluation and Assessment**

To support objective decision-making, we conduct behavioral and leadership assessments using validated tools. These assessments:

- Offer insights into each finalist's strengths and development areas.
- Highlight cultural fit and leadership style.
- It is summarized in clear, actionable reports for the Executive Committee.

### 7. **Assist the Executive Committee in Background Checks and Compensation Negotiation**

We coordinate comprehensive background checks through accredited third-party providers to ensure legal compliance and thoroughness. Additionally, upon request, we:

- Benchmark compensation packages against industry standards.
- Support negotiation of terms that are competitive and aligned with budgetary parameters.

## **Depth of Capabilities and Support**

JPR provides comprehensive, end-to-end support throughout the executive search process, ensuring a seamless and strategic experience for all stakeholders. From initial engagement to final placement, our team is committed to delivering results with precision, transparency, and professionalism. We assign a **dedicated Project Manager** to each search engagement, serving as a single point of contact to ensure consistency, accountability, and timely communication. This individual oversees all phases of the search, coordinates with internal and external stakeholders, and ensures alignment with the Executive Committee's expectations.

To facilitate collaboration and maintain transparency, we offer access to a **secure online portal** where clients can view real-time updates, track milestones, review candidate profiles, and share confidential documents. This centralized platform enhances visibility and streamlines decision-making.

Our team operates with a strong emphasis on **responsiveness**, ensuring that inquiries are addressed promptly and that feedback loops remain active throughout the engagement. We uphold the highest standards of **discretion**, safeguarding sensitive information and maintaining confidentiality at every stage. With a foundation built on **professionalism and integrity**, JPR ensures that the Executive Committee is fully supported—from defining the role and identifying top-tier candidates to facilitate interviews, managing negotiations, and onboarding the selected executive.

## **C. Required Information - INDIVIDUAL QUALIFICATIONS**

### **Jennifer Powers** **Owner & Senior Executive Recruiter**

Jennifer Powers brings over 19 years of experience in the executive search industry and has built a strong reputation for excellence since entering the field in 2005. As the founder and leader of J Powers Recruiting, Inc., she oversees the firm's daily operations, leads strategic growth initiatives, and manages key accounts across the Public Utilities, Engineering, and Construction sectors.

Ms. Powers specializes in full-cycle executive recruitment, strategic talent acquisition, and leadership consulting. Her expertise lies in navigating complex organizational needs and aligning leadership talent with long-term strategic goals. She consistently identifies and recruits top-tier candidates by applying a proven methodology, leveraging deep industry knowledge, and maintaining a tenacious, client-focused approach.

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### **Jenna Flanagan** **Senior Executive Recruiter**

Jenna Flanagan, Lead Senior Executive Recruiter at JPR, brings over 16 years of specialized experience in executive search, with a strong focus on public sector recruitment. She has successfully led full-cycle recruitment efforts for a wide range of public agencies, consistently delivering high-performing candidates who align with each organization's mission, values, and leadership goals. Jenna is highly skilled in identifying and placing executive and managerial talent across the construction, engineering, and public agency sectors. Her strategic approach, deep industry knowledge, and ability to build lasting relationships with HR teams in both multinational and public sector organizations have made her an invaluable asset to JPR.

Jenna has cultivated a trusted and productive partnership with NCPA, where she has placed multiple candidates who continue to thrive in their roles. Her understanding of NCPA's organizational culture and staffing needs, combined with her collaborative style and commitment to excellence, has made her a go-to resource in their talent acquisition efforts. With consistent annual billings exceeding \$350,000, Jenna's performance reflects her dedication to client success and her ability to deliver results that exceed expectations.

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Together, Ms. Powers and Ms. Flanagan will serve as the lead consultants for this engagement, offering a combined 35+ years of demonstrated experience in executive recruitment for public sector entities, including but not limited to:

- Municipal governments
- Special districts
- Joint powers authorities
- Utility agencies

Their collaborative approach ensures strategic alignment with client goals, a commitment to diversity and inclusion, and a seamless recruitment process from candidate profile development through final selection.

**See resumes on the next page**

**RESUME**

**Jennifer Powers**

[jennifer@jpowersinc.com](mailto:jennifer@jpowersinc.com) Phone: (916) 304-6661

**Highlights:**

- Owner and Manager of J Powers Recruiting, Inc., specializing in utilities and transportation engineering & construction.
- Founder of a successful woman-owned business enterprise, currently employing six individuals and expanding.
- Since 2005, we have specialized in executive recruitment within the utility industry. Achieving numerous accolades, including Top Billing Manager, Rookie of the Year, record-breaking sales for a one-month period, and Pacesetter for four consecutive years.
- Thirteen years of experience as a Project Manager in construction prior to transitioning into recruitment.
- Achieved \$1 million in consultative sales faster than any other recruiter in the history of the 35-year firm.
- Consistently produced an average profit of 30% for all projects while serving as a Project Manager.
- Excellent references from clients, candidates, past supervisors, and colleagues.

**Professional Work Experience:**

**J Powers Recruiting, Inc. – Owner/President**  
**Sacramento, CA**

**January 2012 to Present**

- Lead and expand the team, overseeing the daily operations of the recruiting firm.
- Manage key accounts within the Public Utilities, Engineering, and Construction industries.
- Consistently identify and recruit top talent by adhering to a proven process, demonstrating tenacity, leveraging industry expertise, and exploring all potential avenues.

**Recruiting Experience with Public Agencies:**

Client	Position Recruited	Specific Duties and Responsibilities
City of Palo Alto Palo Alto, CA	Engineering Manager, Water, Gas, and Wastewater Chief Operations Officer Principal Electric Engineer	Team Lead – Senior Recruiter
City of San Jose San Jose, CA	Director of Environmental Services	Team Lead – Senior Recruiter
City of Santa Clara Silicon Valley Power Santa Clara, CA	Director of Silicon Valley Assistant Director of Electric Utility Senior Electric Division Manager Electric Division Manager-T&D Senior Electric Division Manager, Customer Engagement	Team Lead – Senior Recruiter
Northern California Power Agency, Roseville, CA	Chief Dam Safety Engineer, Hydro Eng. III-V SCADA Engineer Maintenance Supervisor Plant Engineer	Team Lead – Senior Recruiter
Transbay Joint Power Authority San Francisco, CA	Chief Engineer	Team Lead – Senior Recruiter
Sound Transit Seattle WA	Chief Administrative Officer	Team Lead – Senior Recruiter
San Mateo County Transit San Carlos, CA	RAM Engineer Director of Engineering Maintenance Deputy Director, Safety Senior Project Manager Director of Capital Programs Senior Engineer, Transit Asset	Team Lead – Senior Recruiter

Golden Link Concessionaire LLC San Francisco, CA	Operations Manager, Presidio Parkway Project	Team Lead – Senior Recruiter
California Public Utility Commission San Francisco, CA	Executive Director	Team Lead – Senior Recruiter
California High-Speed Rail Authority Sacramento, CA	Chief Operating Officer	Team Lead – Senior Recruiter
Alta Vista Solutions Richmond, CA	Chief Operating Officer	Team Lead – Senior Recruiter
Bay Area Rapid Transit Oakland, CA	Chief Operating Officer, eBart Group Manager, System Engineering Division Manager, Electrical Engineering Program Manager, Project Controls Program Manager, Civil/Structural Program Manager, Electrical	Team Lead – Senior Recruiter
Transbay Joint Powers Authority San Francisco, CA	Senior Program Manager (now promoted to Executive Director) Senior Construction Manager Both initially reported to the Executive Director	Team Lead – Senior Recruiter
San Francisco State University San Francisco, CA	Associate Vice President Associate Director, CPM-Major Caps Associate Director, CPM-Minor Caps Director of Construction Services	Team Lead – Senior Recruiter
PG&E San Francisco, CA	Director of Project Execution Senior Manager, Power Generation Project Eng.	Team Lead – Senior Recruiter
Utica Water & Power Authority	General Manager	Team Lead – Senior Recruiter
Tri Dam Power Authority	General Manager	Team Lead – Senior Recruiter

**Type of Projects as a PM in Construction:**

- City of Cudahy Park, Cudahy, CA - \$2.6 million: Executed the excavation, hauling, and disposal of 20,000 tons of hazardous waste. Successfully backfilled with clean material and restored the site, including landscaping.
- HS Mann Site, Del Rey, CA - \$2.2 million: Managed the excavation, hauling, and disposal of 16,000 tons of hazardous waste. Backfilled with clean material and restored the site, including fencing and paving.
- K&D Salvage, Bakersfield, CA - \$1.25 million: Constructed an onsite disposal cell, relocating 13,000 cubic yards of hazardous material and constructing an engineered cap.

**Education:**

- Santa Rosa Junior College, Santa Rosa, CA, 1992  
Associate Degree in Civil Engineering Technology

## RESUME

Jenna Flanagan

[Jenna@JPowersInc.com](mailto:Jenna@JPowersInc.com) Cell: (916) 304-6663

### Highlights:

- Talent Acquisition: Lead nationwide recruitment efforts in the utility industry to identify and attract top-tier executive candidates.
- Strategic Planning: Develop and implement comprehensive recruitment strategies aligned with organizational goals.
- Networking: Build and maintain strong relationships with utility industry leaders, professional associations, and potential candidates.
- Candidate Assessment: Conduct thorough evaluations of candidates' qualifications, experience, and cultural fit.
- Employer Branding: Enhance the company's reputation as an employer of choice through targeted outreach and engagement.
- Market Analysis: Stay updated on industry trends and competitive landscape to inform recruitment strategies.
- Team Leadership: Mentor and guide junior recruiters, fostering a collaborative and high-performance team environment.
- Compliance: Ensure all recruitment practices adhere to legal and ethical standards.

### Professional Work Experience:

**J Powers Recruiting, Inc. - National Senior Executive Recruiter**  
 Sacramento, CA

**June 2012-Present**

- Manage the full lifecycle of the recruiting process from client development through candidate selection and placement
- Experience in assessing and selecting for executive managerial positions across the construction, engineering, and public agency industries
- Skilled head-hunter with billings over \$350,000 each year
- Good contacts with various HR departments of various multi-national companies

### Recruiting Experience with Public Agencies:

Client	Position Recruited	Specific Duties and Responsibilities
City of Palo Alto Palo Alto, CA	Assistant Director, Water, Gas, and Wastewater Engineering Manager, Water, Gas, and Wastewater Chief Operations Officer Principal Electrical Engineer	Team Lead – Executive Recruiter
City of San Jose San Jose, CA	Director of Environmental Services	Team Lead – Executive Recruiter
City of Santa Clara Silicon Valley Power Santa Clara, CA	Director of Silicon Valley Assistant Director of Electric Utility Senior Electric Division Manager Electric Division Manager-T&D Senior Electric Division Manager, Customer Engagement	Team Lead – Executive Recruiter
Northern California Power Agency Roseville, CA	Chief Dam Safety Engineer, Hydro Eng. III-V SCADA Engineer Maintenance Supervisor Plant Engineer I&C Civil Engineer Hydro	Team Lead – Executive Recruiter
Redding Electric Utility Redding, CA	Electric Program Supervisor-T&D Operations/Compliance Engineer (2) Distribution Planner System Distribution Operator	Team Lead – Executive Recruiter
Grant County Public Utility District Beverly, WA	Plant Manager	Team Lead – Executive Recruiter

Sound Transit Seattle, WA	Chief Administrative Officer	Team Lead – Executive Recruiter
Tacoma Power Tacoma, WA	Power Generation Mechanical Engineer Engineering Manager	Team Lead – Executive Recruiter
California High-Speed Rail Authority Sacramento, CA	Chief Operating Officer	Team Lead – Executive Recruiter
San Francisco State University San Francisco, CA	Associate Vice President Associate Director, CPM-Major Caps Associate Director, CPM-Minor Caps Director of Construction Services	Team Lead – Executive Recruiter
San Joaquin Electric Stockton, CA	Electrical Estimator-Project Manager	Team Lead – Executive Recruiter
El Dorado Irrigation District Placerville, CA	Hydro Electrical Technician	Team Lead – Executive Recruiter
Roseville Electric Roseville, CA	Power Engineer II	Team Lead – Executive Recruiter
Healdsburg Electric Healdsburg, CA	Principal Electrical Engineer	Team Lead – Executive Recruiter
Tacoma Public Utilities Tacoma, WA	Senior Mechanical Engineer	Team Lead – Executive Recruiter
South Feather Water Power Authority Oroville, CA	Senior Water Resources Engineer	Team Lead – Executive Recruiter
Seattle City Lights Seattle WA	Operations Manager	Team Lead – Executive Recruiter

**Education:**

- California State University, Sacramento, CA  
Bachelor of Arts, Business Administration – Human Resources
- Sierra College, Rocklin, CA  
Associate of Arts, Accounting  
Associate of Science, Business Administration

**C. Required Information - FEE PROPOSAL for GENERAL MANAGER position**

<b>Recruitment FLAT Fee:</b>	<b>\$65,000</b>
<b>Divided into 3 Phases:</b>	<b>\$21,666.66 per billing</b>

**DELIVERABLES**

**PHASE 1. Developing the Search Specification, Research & Sourcing, and Initial Contact, Screening & Evaluation**

***\$21,666.66 - The first 1/3 of the fee is paid at the start of the search***

1. Work and Communicate with Staff and Others
2. Develop a Position Profile and Outreach Plan
3. Develop Selection Criteria
4. Identify a Diverse Group of Applicants
5. Targeted Outreach
6. Candidate Landing Page
7. Execute Candidate Search

**PHASE 2. Candidates Submitted, First Interviews Arranged, Interview Follow-Up, Secondary Interviews Set**

***\$21,666.66 - The second 1/3 of the fee is paid after the candidates are presented to NCPA***

1. Screen Candidates and Provide Profile
2. Candidate Interviews and Assessments
3. Perform Reference and Background Checks

**PHASE NO 3. Final Interview, Decision Time, Start Date Post Post-Employment Follow-Up**

***\$21,666.66 - The final fee is to be paid when a candidate verbally accepts NCPA's offer***

1. Final selection of the candidate
2. Consult with NCPA General Counsel
3. Transition Activities
4. Failed Search Mitigation
5. Other Relevant Activities

**B. Candidate Travel Expenses:**

Candidate's approved travel costs and expenses will be paid by NCPA.

**C. JPR Travel Expenses:**

**Included**

Travel costs (if required) for JPR staff are included in the fee.

**D. Additional costs to be pre-approved by NCPA and billed as a pass-through with no markup:**

1. If NCPA instructs JPR to place advertisements in specific publications or job boards, NCPA will be invoiced as a pass-through with no additional markups.
2. If NCPA directs JPR to conduct specific background checks (not including reference checks), NCPA will be billed as a pass-through with no additional markups.

**E. JPR's Credit/Replacement Policy:**

**Replacement Policy:**

If the candidate placed with NCPA voluntarily terminates their employment or is terminated for cause as explained in writing by NCPA within 5 business days of the departure of the candidate within the first 6 months of employment, the following replacement program will be followed:

# of days Candidate Employed:	What we will do:
1 to 30	60 days to find a replacement. If no replacement is found, 100% of the fee is <b>credited</b> to the client.
31 to 90	60 days to find a replacement. If no replacement is found, 50% of the fee is <b>credited</b> to the client.
91 to 180	60 days to find a replacement. If no replacement is found, 25% of the fee is <b>credited</b> to a new search.

After 181 days and up to 5 years if the candidate is placed with NCPA, voluntarily terminates their employment OR is terminated for cause as explained in writing by NCPA within 5 business days of the departure of the candidate OR if the candidate is promoted to a different role within the NCPA, then the following replacement program will be followed:

# of days Candidate Employed:	What we will do:
181 to 1825 (6 months to 5 years from the start date)	A new search will be conducted – the client <b>charged</b> an additional fee of 90% of the original invoice.

There is NO Replacement for Candidates that are placed as a Replacement for the Original Candidate.

**Refund policy for the initial 1/3 of the fee:**

This fee is non-refundable.

**Replacement Voided:**

The above policies shall not apply if the candidate’s employment is terminated due to a layoff for any reason, due to the elimination of a position, a substantial change in the job description or reporting structure, or a change in the candidate’s compensation package. JPR shall not be liable for any compensatory or other damages resulting from the employment of the candidate. The replacement policy only applies to the original candidate placed in particular - it is not valid for any subsequent candidates placed in that role.

**F. Referral of Candidates:**

A candidate is considered referred to NCPA when JPR identifies a candidate by name and current employer (or most recent employer if a candidate is currently unemployed) in connection with a specific search opportunity or with notification by presentation of a resume of a candidate seeking employment with NCPA. The referral of a candidate, either orally, electronically, or in written form, is done at the request of NCPA and is confidential. Neither a candidate nor a resume may be referred to any individual or entity outside of NCPA without the prior written consent of JPR. NCPA acknowledges and agrees that if JPR is the “procuring source” of interest in a particular candidate, JPR will be given full referral credit for said candidate, without regard to whether NCPA may have had access to said candidate’s name or background via job boards, resume databases, or other means as long as NCPA has not directly conducted a face-to-face interview with the candidate in the preceding 180 days. JPR is entitled to full credit for the referral of the candidate’s background.

**G. Exclusivity for a Set Time Period:**

Any person NCPA sources for this role, regardless of how they were sourced, will be forwarded to JPR, and that person will be screened/interviewed and presented on the same basis as all other candidates being considered for the role.

Each task assignment will have a corresponding schedule. NCPA and JPR will agree to a time period (usually 180 days) where, at the end of that time period, NCPA can either a) extend the search or b) cancel the search. The search will automatically extend at the end of the time period. Or, NCPA can formally choose to extend the search, and the schedule will be revised and agreed upon by both parties. If NCPA chooses to cancel the search (in writing), no additional fees will be due to JPR (beyond what work has already been accomplished), and NCPA will not receive a refund for the fee already received.

**H. Multiple candidates hired from the same search efforts:**

If, in the event additional candidates are hired by the NCPA from the original candidate pool for the General Manager, within 1 year of the candidate being submitted by JPR, a reduced rate of 10% of the base salary will be owed to JPR.

**C. Required Information - REFERENCES**

**REFERENCE NO. 1**

**Company/Organization Name:** City of San Jose  
Customer Address: 200 East Santa Clara Street  
San Jose, CA 95113

**Contact Name:** Manuel Pineda  
**Title:** Deputy City Manager  
Contact Phone Number: (408) 615-2200  
Contact Email Address: [Manuel.Pineda@sanjoseca.gov](mailto:Manuel.Pineda@sanjoseca.gov)

**NOTE: Manuel was the CEO at Silicon Valley Power and is a reference for the work that JPR did for Silicon Valley Power.**

**REFERENCE NO. 2**

**Company/Organization Name:** City of Palo Alto  
Customer Address: 250 Hamilton Avenue  
Palo Alto, CA 94301

**Contact Name:** Alan Kurotori  
**Title:** Utility Director  
Contact Phone Number: (408) 569-6336  
Contact Email Address: [alan.kurotori@cityofpaloalto.org](mailto:alan.kurotori@cityofpaloalto.org)

**NOTE: Alan has served as a reference for several recruitments conducted by JPR for the City of Palo Alto, including the Chief Operating Officer, Assistant Director of Water, Gas, and Wastewater, and Engineering Manager for Water, Gas, and Wastewater roles.**

**REFERENCE NO. 3**

**Company/Organization Name:** Silicon Valley Power / City of Santa Clara  
Customer Address: 1500 Warburton Avenue  
Santa Clara, CA 95050

**Contact Name:** Nicolas (Nico) Procos  
**Title:** Director of Utilities  
Contact Phone Number: (415) 816-3690  
Contact Email Address: [nprocos@santaclaraca.gov](mailto:nprocos@santaclaraca.gov)

## **C. Required Information/Other Information - CANDIDATE BACKGROUND - Checks Methodology and Executive Retention Rates**

### **Background Check Methodology**

JPR employs a comprehensive, legally compliant, and client-tailored approach to conduct background checks for identified candidates. Our process is designed to ensure accuracy, confidentiality, and alignment with each hiring organization's standards and legal obligations. We understand that thorough vetting is essential to building trust and ensuring long-term success in executive placements.

Key components of our background check methodology include:

- **Third-Party Verification:** We partner with accredited and reputable background screening firms to conduct detailed checks, including criminal history, employment verification, education credentials, professional licenses, and civil litigation records.
- **Reference Checks:** Our team conducts in-depth reference interviews with former supervisors, peers, and direct reports to gain insight into each candidate's leadership style, performance history, and workplace behavior.
- **Credential Validation:** All academic degrees, certifications, and licenses are verified directly with issuing institutions or governing bodies to ensure authenticity and relevance.
- **Compliance Assurance:** Our procedures strictly adhere to all applicable federal, state, and local laws, including the Fair Credit Reporting Act (FCRA), Equal Employment Opportunity (EEO) guidelines, and any client-specific compliance requirements.
- **Customizable Screening:** We tailor the scope of background checks to meet each client's unique needs. This may include additional screenings such as credit history, driving records, or security clearance verification, depending on the role and agency requirements.

Our commitment to integrity, transparency, and legal compliance ensures that every candidate presented has been thoroughly vetted and meets the highest standards of professionalism and trustworthiness. This rigorous process supports confident hiring decisions and contributes to long-term organizational success.

### **Executive Retention Rates**

JPR is proud of its strong track record in executive placements, with a focus on long-term organizational fit and leadership impact. We don't just fill roles, we help build leadership teams that drive results and align with our clients' missions.

Our executive retention metrics speak to the quality and sustainability of our recruitment outcomes:

- **Two-Year Retention Rate:** Over 95% of executives placed by JPR remain in their roles for at least two years, demonstrating our commitment to long-term success.
- **Client Satisfaction:** Post-placement surveys consistently show high satisfaction with candidate performance, cultural alignment, and leadership effectiveness.
- **Follow-Up Support:** We provide post-placement check-ins and onboarding consultations to ensure smooth integration and continued success.

Our process is rooted in strategic alignment, rigorous vetting, and ongoing support. We take the time to understand each organization's unique culture, leadership needs, and long-term goals. By doing so, we ensure that the leaders we place are not only qualified but also positioned to make a meaningful impact. Our commitment doesn't end at placement—we stay engaged to support retention and performance, helping our clients build resilient, high-performing teams.

**C. Required Information - ACKNOWLEDGEMENT OF AGREEMENT AND STATEMENT OF EXCEPTIONS**

J Powers Recruiting, Inc. certifies that it takes no exception(s) to this RFP, including, but not limited to, NCPA's Consulting Services Agreement, included as Appendix A.

**C. Required Information - SAFETY COMPLIANCE**

As required by the NCPA Contractor Safety Procedure, see next page, a copy of evidence of JPR's Workers' Compensation insurance.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/4/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> McGee & Thielen Insurance Brokers, Inc. 3840 Rosin Court, Suite 245 Sacramento, CA 95834  www.mcgeethielen.com      0633187	<b>CONTACT NAME:</b> Amber Greenberg	
	<b>PHONE (A/C. No. Ext):</b> 916-561-4614	<b>FAX (A/C. No):</b> 916-561-4658
<b>E-MAIL ADDRESS:</b> agreenberg@mcgeethielen.com		
<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
<b>INSURER A:</b> Preferred Employers Insurance Company		10900
<b>INSURER B:</b>		
<b>INSURER C:</b>		
<b>INSURER D:</b>		
<b>INSURER E:</b>		
<b>INSURER F:</b>		

**COVERAGES**      **CERTIFICATE NUMBER:** 86584325      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N Y	N/A	PEG310868134	6/24/2025	6/24/2026	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

For Verification Purposes Only

## CERTIFICATE HOLDER

For Verification Purposes Only

## CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Amber Greenberg

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# SEARCH PROJECT SCHEDULE SAMPLE - **EXHIBIT A**

CLIENT: **Northern California Power Agency (NCPA)**

POSITION: **General Manager**

ESTIMATED COMPLETION DATE: **Within 11 to 16 weeks from the start of the search**

Phase	Activities	Timeline
Phase 1	Work and Communicate with Staff and Others <ul style="list-style-type: none"> <li>• Kickoff Meeting with Executive Committee and NCPA Commission.</li> <li>• Establish communication protocols and confidentiality guidelines.</li> <li>• Stakeholder Engagement.</li> <li>• Confidentiality Assurance.</li> <li>• Documentation and Reporting.</li> </ul>	Week 1
Phase 2	Develop Position Profile & Outreach Plan <ul style="list-style-type: none"> <li>• Develop a comprehensive Position Profile.</li> <li>• Create an Outreach Strategy Design and Plan with benchmarks for diversity and reach.</li> <li>• Finalize and publish the Position Announcement.</li> </ul>	Weeks 2–3 <i>Dependent on the NCPA's approval process</i>
Phase 3	Develop Selection Criteria <ul style="list-style-type: none"> <li>• Reviewing the job description and organizational context.</li> <li>• Identifying core competencies, leadership attributes, and performance expectations.</li> <li>• Ensuring criteria reflect NCPA's commitment to diversity, equity, and inclusion.</li> </ul>	Week 3
Phase 4	Identify a Diverse Group of Applicants <ul style="list-style-type: none"> <li>• Conducting outreach at national, regional, and local levels.</li> <li>• Engaging both active job seekers and paying particular attention to the “passive job seekers”.</li> <li>• Leveraging networks, professional associations, and diversity-focused platforms.</li> </ul>	Week 3
Phase 5	Target Outreach <ul style="list-style-type: none"> <li>• Direct engagement with professionals in public agencies, Community Choice Aggregators (CCAs), and similar utility entities.</li> <li>• Use of proprietary databases, firm contacts, and executive networks.</li> <li>• Distribution of candidate questionnaires to assess interest and alignment.</li> </ul>	Week 3
Phase 6	Candidate Landing Page <ul style="list-style-type: none"> <li>• A password-protected landing page will be created to house all candidate materials in one centralized, confidential location.</li> <li>• Executive Committee members and designated staff will have exclusive access to review resumes, candidate profiles, interview notes, and assessment results at their convenience, supporting informed and timely decision-making.</li> </ul>	Week 3
Phase 7	Execute Candidate Search <ul style="list-style-type: none"> <li>• Targeted outreach and candidate engagement to identify and connect with individuals who possess the desired qualifications and align with the organization's mission and culture.</li> <li>• Collaboration with the Executive Committee to review and refine the candidate pool, ensuring a shared understanding of priorities and preferences.</li> <li>• Continuous feedback loops throughout the process to maintain alignment, address emerging needs, and adjust the strategy as necessary to achieve the best outcome.</li> </ul>	Weeks 4–7
Phase 8	Screen Candidate and Provide Profile <ul style="list-style-type: none"> <li>• Our goal is to identify approximately five well-vetted, motivated candidates who fall within the established salary range and timeline. Each will be selected based on their demonstrated strengths, relevant background, and clear alignment with the position requirements.</li> <li>• Supporting materials, including resumes, cover letters, and results from preliminary assessments, to provide a well-rounded view of each candidate.</li> <li>• Source a list of 300+ targeted, potential, diverse candidates, and will encourage interested candidates to apply for the position.</li> <li>• Present the opportunity to everyone on the list.</li> <li>• If we are unsuccessful in speaking to each candidate, we leave at least 2 voicemails.</li> <li>• Send bulk emails/ LinkedIn messages to this same list with a brief written presentation of the opportunity.</li> <li>• If necessary, we will add more targeted candidates to the list.</li> </ul>	Weeks 8–9
Phase 9	Candidate Interviews & Assessments	Weeks 10–11

	<ul style="list-style-type: none"> <li>• Designing structured interview questions aligned with selection criteria.</li> <li>• Coordinating interview logistics and panel participation. <ul style="list-style-type: none"> <li>○ JPR Team will handle the facilitation and coordination of the interview process from beginning to end with all participants.</li> <li>○ Coordinate the in-person / phone / Zoom interview.</li> <li>○ Prepare and debrief the candidate and NCPA.</li> <li>○ Prepare and debrief the candidate and NCPA.</li> </ul> </li> <li>• Facilitating candidate assessments, including leadership and behavioral evaluations. <ul style="list-style-type: none"> <li>○ Give them the assignment to test their motivation, in the form of written answers to questions about the position. If they complete it, it shows motivation and gives a sample of their writing skills.</li> </ul> </li> <li>• JPR will ensure and verify that candidates are authorized to work in the U.S.</li> </ul>	
Phase 10	<b>Finalist Background Checks</b> <ul style="list-style-type: none"> <li>• Comprehensive reference checks with former supervisors and colleagues. <ul style="list-style-type: none"> <li>○ JPR to conduct all reference checks – a minimum of 3 professionals for each finalist.</li> <li>○ To be done after the first interview and before setting up face-to-face.</li> <li>○ Send reference check reports to NCPA.</li> </ul> </li> <li>• Background checks, including employment verification, litigation history, and publicly available records. <ul style="list-style-type: none"> <li>○ Background checks, degree, and employment verification, etc., to be conducted by JPR (to be agreed upon by NCPA).</li> </ul> </li> <li>• Optional third-party screening services as requested.</li> </ul>	Week 12
Phase 11	<b>Final Selection of Candidate &amp; Negotiation</b> <ul style="list-style-type: none"> <li>• Facilitating Executive Committee deliberations. <ul style="list-style-type: none"> <li>○ Present candidates to NCPA, including the Complete Candidate Presentation, a summary of the Qualifying Candidate Form, resume, written assignment, candidate information sheet, and other concerns.</li> <li>○ JPR will use the Candidate Ranking Sheet to provide insights and make recommendations on the candidates.</li> <li>○ Develop and deliver written reports to NPCA. The Status Report will highlight the results of the recruitment and subsequent screening interviews.</li> </ul> </li> <li>• Supporting offer development and negotiation. <ul style="list-style-type: none"> <li>○ JPR is dedicated to facilitating the candidate's acceptance of the job offer from NCPA and commencing work on the agreed-upon start date.</li> </ul> </li> <li>• Advising on retention strategies to ensure long-term success.</li> </ul>	Week 13
Phase 12	<b>Consult with NCPA General Counsel</b> <ul style="list-style-type: none"> <li>• Review employment contracts and legal documentation.</li> <li>• Ensure compliance with applicable laws and organizational policies.</li> </ul>	Week 14
Phase 13	<b>Transition Activities</b> <ul style="list-style-type: none"> <li>• Develop a transition plan in collaboration with NCPA leadership. <ul style="list-style-type: none"> <li>○ JPR aims to smooth the candidate's transition to NCPA by thoroughly assessing their readiness to relocate to California. JPR will provide the candidate with our relocation toolkit, detailing community demographics, economic conditions, cost of living analysis, salary comparisons, estimated moving costs, home values, etc.</li> </ul> </li> <li>• Provide onboarding resources and coaching as needed. <ul style="list-style-type: none"> <li>○ Moreover, JPR will clarify the candidate NCPA's work policies regarding onsite, hybrid, and remote work schedules.</li> </ul> </li> <li>• Monitor early performance and integration.</li> </ul>	Week 15
Phase 14	<b>Failed Search Mitigation (if needed)</b> <ul style="list-style-type: none"> <li>• Activate a contingency plan at no additional cost.</li> <li>• Reassess the position profile and outreach strategy.</li> <li>• Relaunch the search with revised parameters and timelines.</li> </ul>	Week 16
Phase 15	<b>Other Relevant Activities</b> <ul style="list-style-type: none"> <li>• Implement strategies to increase candidate diversity and innovation.</li> <li>• Provide market insights and benchmarking data.</li> <li>• Offer optional services such as relocation support and executive coaching.</li> </ul>	



5800 Stanford Ranch Road  
Suite 410  
Rocklin, California 95765  
916.630.4900

September 18, 2025

Chair James "Bo" Sheppard  
And Members of the NCPA Executive Committee  
Northern California Power Agency  
651 Commerce Drive  
Roseville, California 95678

Via Email: [Brynna.Bryant@ncpa.com](mailto:Brynna.Bryant@ncpa.com)

Dear Chair Sheppard and Members of the NCPA Executive Committee:

Ralph Andersen & Associates is passionate about executive recruitment. As the nation's oldest and most successful public sector executive search firm, we are proud of our recruiting practice. It is the core of our business, and no one does it better.

Our consulting practice specializes in recruiting for local government agencies, both in California and nationally. Additionally, we have conducted recruitments specifically for utility and special districts. In the utility space, we also have experience working with power agencies on various recruitment engagements over the years. This is a specialty area, and not many search firms work in this field. It's a very specialized field and a niche area of executive search.

Ralph Andersen & Associates has a long and successful history of placing highly talented executives in public agencies from coast to coast. We are also proud of how we market and represent our clients; all of our marketing materials' design, graphics, and printing are done in-house so we can control the quality and production timing.

We are prepared to devote considerable effort and use our resources to ensure that the General Manager will represent the profession's highest standards. We have no exceptions listed in the Request for Proposal and Exhibits.

Thank you very much for considering this proposal. We are ready to proceed upon notification of approval. Should you have any questions or need further clarification, you may reach me at (916) 630-4900 or on my cell phone at (916) 804-2885.

Sincerely,

Heather Renschler  
President/CEO



5800 Stanford Ranch Road  
Suite 410  
Rocklin, California 95765  
916.630.4900

## Executive Summary

Attracting top talent has never been more complex and Ralph Andersen & Associates is highly qualified to assist the Northern California Power Agency (NCPA) with recruiting the next General Manager.

We have conducted more successful executive recruitments than any other firm since 1972. From helping you to create a competency-based interviewing framework, to assessing candidates and attracting top human capital, our search professionals offer an unparalleled depth of experience, national reach, and industry knowledge.

The Agency has requested our proposal to assist in the identification and recruitment of a highly qualified group of candidates for General Manager. In particular, the Agency is seeking a firm with the national reach and professional experience to clearly assess your organizational needs and formulate a strategy to deliver results.

At Ralph Andersen & Associates, we believe that gaining a complete understanding of our client's specific objectives and priorities is essential prior to launching any search assignment. This process includes the identification and incorporation of a variety of important details such as the candidate's desired skills and experience as well as the critical "soft skills" related to temperament, personality, management philosophy, and other factors that will ultimately determine the candidate's "fit" with the organization.

We begin each search by working closely with your leadership, stakeholders, staff, and, when appropriate, the community to ensure a complete picture of the desired candidate pool is developed. Our team-oriented approach matched with this 360-degree perspective means we ensure that a complete understanding of the organization's mission and culture translates into those specific traits and characteristics necessary to ensure the selected candidate is successful in the position.

Ralph Andersen & Associates has developed a means to include community involvement, when appropriate, in various phases of executive recruitment, and we certainly know the importance of community involvement in an inclusive and progressive Agency such as NCPA.

We understand that the Agency expects aggressive, personalized outreach to identify a diverse and highly qualified applicant pool and a selection process that includes comprehensive candidate reports based on thorough reference and background checks. We will begin with fully detailed profiles of the desired candidate's characteristics and build a recruitment strategy that is tailored to meet your specific needs. The resulting outreach and advertising campaign will incorporate the extensive use of personal outreach to recruit a diverse and highly qualified group of candidates.

Ralph Andersen & Associates has been providing practical, responsive executive search and management consulting services to the local public sector and related industries since 1972. With each new assignment, we earn our reputation as the nation's premier local government consulting organization.

Ralph Andersen & Associates is committed to serving the Northern California Power Agency's needs. Careful consideration is given to the staff selected for each search so that the needs of the Agency and other clients are balanced. The Northern California Power Agency will have the vast experience of all our recruiters at their disposal.

## Why Choose Ralph Andersen & Associates?

Ralph Andersen & Associates, a California Corporation, has been providing executive search and management consulting services since 1972. As such, the executive recruitment techniques used by Ralph Andersen & Associates have been developed and used successfully with hundreds of clients for more than 53 years.

With Ralph Andersen & Associates, there is an entire team behind every recruitment. Our firm takes a multi-disciplined, team approach to executive search. Successful outreach relies heavily on person-to-person contact to identify outstanding potential candidates and, in the evaluation phase, to gain a complete understanding of the background, experience, and management style of the top candidates. By drawing on the combined expertise of our associates and our network of professional contacts, we address outreach from a wide variety of perspectives and find unique ways to identify and recruit the best and brightest.

We believe strongly in providing timely client communications and while we will deliver regular status reports at each stage of the search, our consultants pride themselves in being highly accessible and responsive to all client requests and inquiries. Ms. Heather Renschler as President/CEO of Ralph Andersen & Associates will be the main point of contact with the Agency. She can be reached at:

Heather Renschler, President/CEO  
5800 Stanford Ranch Road, Suite 410 Rocklin, California 95765  
(916) 630-4900 / (916) 804-2885 (cell)  
[heather@ralphandersen.com](mailto:heather@ralphandersen.com)

## Summary of Our Search Process

The successful search process relies heavily on person-to-person contact to identify outstanding potential candidates and, in the evaluation phase, to gain a complete understanding of the background, experience, and management style of the top candidates. The executive recruitment techniques used by Ralph Andersen & Associates have been developed and used successfully with hundreds of clients for more than 53 years.

We feel that the key elements of the search process, which can be tailored to fit the specific needs of the Northern California Power Agency, should include:

- Developing a comprehensive position profile based upon information obtained in video meetings with the designated project manager, search committee, and other appropriate stakeholders as directed.
- Extensive *personal outreach*, via telephone and through internet technology, to qualified candidates throughout California and the Western region. Out-of-state candidates may apply although the focus will be on in-state experience.
- A marketing strategy that uses selected advertising to supplement the extensive candidate identification process, uses the Internet and social media, and also uses our already established professional contacts in the field of utility management.
- A screening and assessment process that narrows the field of candidates to those that most closely match the needs of the Agency and is based on extensive reference checks and telephone interviews with the top candidates.

- Delivering a product in the form of a search report that recommends the top group of candidates and provides the decision-makers with detailed information about their backgrounds and experience.
- Assistance during the interview and selection process and in the negotiation of a compensation package.

## Search Work Plan

We approach every search with a sense of excitement and urgency and we always “hit the ground running.” That means that when the Agency gives us notice to proceed, we kickoff the process immediately – working closely with the project manager, Agency, search committee and other appropriate stakeholders as requested, to identify the key characteristics and professional experience desired in the candidate pool. We believe strongly in providing timely client communications, and while we will deliver regular status reports at each stage of the search, our consultants pride themselves in being highly accessible and responsive to all client requests and inquiries.

### Task 1 – Review Project Management Approach

The Project Director is available to begin work on this project within 10 days after the Agency provides a contract or, alternatively, an official notice to proceed. The first task will include established individual and/or group meetings with the designated Agency’s hiring manager and/or the NCPA Executive Committee as appropriate to finalize the recruiting and selection process. We prefer this to be done via video. This will include discussion of the project management for the specific search, workplan review, timing confirmation, and communication methods. Working collaboratively with the designated project manager, NCPA Executive Committee, search committee, and other appropriate stakeholders, this task will result in a more definitive timetable.

As part of our overall approach to this project, the Project Director will deliver regular updates (typically done orally) throughout each search stage. In addition, the Project Director will be highly accessible and responsive to client requests and inquiries.

### Task 2 – Develop Position Profile

The position profile for the General Manager is the guide for the entire search process. The development of the profile includes the collection of technical information and recruitment criteria.

#### Technical Information

The Search Team will conduct video meetings with the designated project manager, NCPA Executive Committee, search committee and other appropriate stakeholders as directed by the Agency to gain an understanding of the experience and professional background requirements desired in the General Manager. These meetings will also help the Project Director gain an understanding of the work environment and the issues facing the Northern California Power Agency. In-person meetings can be arranged with sufficient advance notice.

#### Recruitment Criteria

The recruitment criteria are those personal and professional characteristics and experiences desired in the General Manager. The criteria should reflect the goals and priorities of the Northern California Power Agency.

Subsequent to the development and adoption of the candidate profile, the technical information and recruitment criteria will be documented in an information brochure prepared by Ralph Andersen & Associates. The brochure will be reviewed by the Agency in draft format, revised as appropriate, and published for use throughout the search.

### Task 3 – Outreach and Recruiting

This task is among the most important of the entire search. It is the focus of the activities of the Project Director and includes specific outreach and recruiting activities briefly described below.

#### Outreach

An accelerated outreach and advertising campaign will be developed. It will include the placement of ads in publications such as *American Public Power Association (APPA)* and other professional publications as well as specific Internet sites related to government will be used as a method of extending the specific outreach in a short period of time.

Additionally, the advertisement and the full text of the position profile (the recruitment brochure) will be placed on Ralph Andersen & Associates' website, which is accessed by a large number of qualified candidates. This method of outreach to potential applicants provides a confidential source that is monitored by many key level executives on an on-going basis.

#### Candidate Identification

Ralph Andersen & Associates will use their extensive contacts to focus the recruiting effort. In making these contacts, the Project Director will target those individuals who meet the criteria set by the Agency. Each of the candidates identified through the recruiting efforts will be sent an information brochure. Candidates will also be contacted directly to discuss the position and to solicit their interest in being considered.

Both the outreach and recruiting activities will result in applications and resumes from interested candidates. As they are received, resumes will be acknowledged and candidates will be advised of the general timing of the search process. The following tasks involve the actual selection process, once all resumes have been received.

### Task 4 – Candidate Evaluation

This task will be conducted following the application closing date. It includes the following specific activities:

#### Screening

All of the applications will be carefully reviewed. Those that meet the recruitment criteria and minimum qualifications will be identified and subject to a more detailed evaluation. This evaluation will include consideration of such factors as professional experience, and size and complexity of the candidate's current organization as compared to the candidate profile.

#### Preliminary Research and Internet Review

The research staff of Ralph Andersen & Associates, under the direction of the Project Director, will conduct preliminary research and internet review for those candidates identified as the most qualified as a result of the screening process. This

level of research will be done on a limited number of candidates to learn more about each candidate's public profile and related information that is available on the internet.

### Preliminary Interviews via Video Technology

The Project Director will conduct preliminary interviews with the top group of candidates identified through the screening and preliminary research and Internet review processes. The interviews are extensive and designed to gain additional information about the candidates' experience, management style, and "fit" with the recruitment criteria. Interviews will be conducted using video technology.

The screening portion of the candidate evaluation process typically reduces a field of applicants to approximately four (4) to six (6) individuals. Those individuals will be reviewed with the designated project manager, NCPA Executive Committee, search committee and/or other appropriate stakeholders prior to proceeding with the individual interviews.

### Task 5 – Search Report

After completing Task 4, all documentation will be supplied to the Agency electronically. No hard copies will be supplied to the Agency for any phase of this search engagement. The Search Team will prepare detailed information for review including resumes uploaded to a file sharing system (i.e., OneDrive or ShareFile). The Search Team will conduct a video conference call or in-person meeting with the designated project manager, Agency, search committee and other appropriate stakeholders to review the search report on the top candidates. The report divides all of the candidates into four groups including 1) the top group of candidates that are recommended to be interviewed via video by the search committee; 2) a backup group to the first group; 3) no further consideration group; and 4) lacks minimum qualifications. The search report will include candidate resumes and cover letters. The results of preliminary media research will be included. This meeting will result in a confirmed group of top candidates for the Agency to further consider.

Important to note, we typically do not conduct references on all of the finalist candidates. The more standard process is to do a partial background on the top 2-3 candidates with various verifications, internet search, and limited references (outside of current employer). References for current employers are often not released by candidates until the final stage of the search process when they are assured of being the candidate of choice. Verifications such as credit check, DMV Report, and civil/criminal are typically conducted once a contingent offer is made to the selected candidate unless the finalist candidate(s) give explicit approval and sign a release to proceed. Education checks are conducted before the slate of candidates interviews with the search committee.

The results of the Search Report will be a confirmed group of finalist candidates that the Agency will interview.

### Task 6 – Selection

The final selection process will vary depending upon the desires of the Agency. The typical services provided by Ralph Andersen & Associates in the selection process are described briefly below:

- The Project Director will coordinate the selection process for the finalist group of candidates. This includes handling the logistical matters with candidates and with the Agency.
- Ralph Andersen & Associates will prepare an electronic interview booklet (uploaded to a file sharing program such as One Drive or ShareFile) that includes the resume,

cover letter, and preliminary media research for each candidate. In addition, this electronic information will contain suggested questions and areas for discussion based upon the recruitment criteria. Electronic copies of the interview booklet will be provided in advance of the candidate interviews. No hard copies of material will be provided. Should the Agency desire hard copies, that will be the responsibility of the Agency to produce and distribute.

- A member of the Search Team will facilitate the Interviews to assist the Agency through the selection process. This assistance will include an initial orientation, candidate introductions, and facilitation of discussion of candidates after all interviews have been completed.
- Additionally, verifications will be made on the top 2-3 candidates and will include education verifications, Department of Motor Vehicle check, and credit check. The results of these verifications will be discussed with the Agency at the appropriate time.
- Informal (limited) reference checks will be conducted on the top 2-3 candidates. A more detailed reference report will be done on the top candidate. The results of these reference checks will be discussed with the Agency at the appropriate time during a closed session.
- As needed, a member of the Project Director will be available to provide assistance to the Agency in the final selection as may be desired. This assistance may include providing or obtaining any additional information desired to assist in making the final selection decision.

### Task 7 – Negotiation

The Project Director will be available to assist the Agency in negotiating a compensation package with the selected candidate. This includes recommendations on setting compensation levels.

### Task 8 – Close Out

After the Agency has reached agreement with the individual selected for the position, the Project Director will close out the search. These activities will include advising all of the finalist candidates of the status of the search by telephone.

## Project Timeline

Ralph Andersen & Associates will typically complete each search within 90 days from the execution of the agreement to the presentation of candidates. After finalist interviews, negotiation with the top candidate will take an additional week or two. Our timeline does not account for transition time.

We will work to the best of our ability to complete this search within the needed timeline.

# Proposer Capabilities & Qualifications

## History of the Firm

Ralph Andersen & Associates has been providing practical, responsive executive search and management consulting services to the local public sector and related industries since 1972. With each new assignment, we earn our reputation as the nation's premier local government consulting organization.

Ralph Andersen & Associates has more than 53 years of experience conducting executive recruitments for a variety of public sector agencies.

Ralph Andersen & Associates serves a nationwide clientele through its network of professionals associated with the firm. Ralph Andersen & Associates also provides services to municipal clients throughout the United States.

## Firm Organization

Ralph Andersen & Associates is a corporation and is not a subsidiary, nor does it have any subsidiaries. Since 1972, Ralph Andersen & Associates has been providing executive search and management consulting services to public sector agencies across the nation.

Ralph Andersen & Associates has more than 53 years of experience conducting executive recruitments for a variety of public sector agencies. The executive recruitment techniques used by Ralph Andersen & Associates have been developed and used successfully with hundreds of clients. Our substantial background and understanding of cities makes us ideally suited to represent the interests of the Northern California Power Agency.

We take a multi-disciplinary approach to executive search and the entire process. This is where Ralph Andersen & Associates sets itself apart:

- There's always an entire team behind every assignment;
- We provide high-level, experienced, advice and counsel to our clients; and
- We keep commitments and perform at a level that exceeds our client's expectations.

Ralph Andersen & Associates serves a nationwide clientele through its corporate office in Sacramento (Rocklin), California. Our national staff of professionals and support staff include acknowledged leaders in their respective fields. Supplementing their extensive consulting backgrounds, our senior staff all have personal, hands-on executive experience in the operation of public agencies and private businesses.

## Search Team

The search firm's reputation and the recruiters' personal commitment define the difference between the success and failure of any recruitment. Ralph Andersen & Associates' search professionals are acknowledged leaders in the field and possess a broad range of skills and experience in local government management, executive search, and related disciplines. Only senior members of Ralph Andersen & Associates are assigned to lead search assignments, ensuring that their broad experience and knowledge of the industry are brought to bear on our client's behalf. The Northern California Power Agency will have

Ms. Heather Renschler, President/CEO of Ralph Andersen & Associates as the Project Director.

### Ms. Heather Renschler, President/CEO / Project Director



Ms. Renschler has been with Ralph Andersen & Associates for more than 39 years and is the firm's President/CEO. Ms. Renschler has overseen the recruitment practice of Ralph Andersen & Associates for the last 27 years and, as a result, is often involved with recruitments on a national scale and those of a highly sensitive and critical nature. She is experienced at working with boards, city councils, staff members, and selection committees in the recruitment and selection process.

Ms. Renschler has extensive experience conducting public sector recruitments and, as a result, has developed a network of contacts and potential candidates nationally. Ms. Renschler has had significant involvement in city manager-related searches over an extended period of time and, as a result, has an extensive network from which to attract potential candidates.

Before joining Ralph Andersen & Associates, Ms. Renschler had extensive private sector experience in construction management, health care, and public accounting. Ms. Renschler attended the University of Toledo and majored in Accounting and Journalism and obtained a Bachelor's degree in Public Administration from the University of San Francisco.

Ms. Renschler may be reached at (916) 630-4900 or directly on her cell at (916) 804-2885 or via email at [heather@ralphandersen.com](mailto:heather@ralphandersen.com).

### Paraprofessional and Support Staff

Paraprofessionals, graphics, and support staff will provide administrative support to the consultant team on recruitment assignments. These may include Ms. Diana Hausmann, Ms. Christen Sanchez, Ms. Hannah Jones, and Ms. Karen AllGood.



## Power Related Experience

Ralph Andersen & Associates conducts a wide array of searches in the public sector. Our experience spans populations of all sizes, from the largest in the country to small and mid-size municipalities. Additionally, Ralph Andersen & Associates has a key focus on power-related recruitment.

Listed below is a comprehensive listing of positions conducted for power agencies and associations that would be examples of our expertise. Ms. Renschler has been the Project Director on the majority of these engagements.

- California Municipal Utility Association
  - Executive Director (2016)
- Glendale, City of
  - General Manager, Water & Power Department (2021)
- Los Angeles, City of (Office of Public Accountability LADWP)
  - Assistant Executive Director (2013)
  - Executive Director / Rate Payer Advocate (2011)
  - Multiple Positions / Multiple Levels: Utility Rates and Policy Specialist I/II/III (2012 and 2021)
- Los Angeles Department of Water & Power (LADWP)
  - Assistant Director Procurement in the Supply Chain Services Division (2016)
  - Chief Information Officer (CIO) (2016)
  - Chief Information Technology Officer (CITO) (2021)
  - Director of Customer Operations (2013)
  - Director of Energy Efficiency (2023)
  - Director of Security and Emergency Management (2016)
  - Executive Director Energy Efficiency Group (2011)
  - Inspector General (2021)
- Redding, City of
  - Director of Electric Utility (2022)
- Roseville, City of
  - Assistant Electric Utility Director (2017)
- Sacramento Municipal Utility District (SMUD)
  - Manager, Commodity Procurement & Sales (2007)
  - Manager, Power Generation (2007)
  - Manager, Regulatory Compliance and Coordination (2007)
- Southern California Public Power Authority of California (SCPPA)
  - General Counsel (2020)
- Transmission Agency of Northern California
  - General Manager (2022 & 2025)

# Cost

The recruitment efforts for the position of General Manager for the Northern California Power Agency will be a national search process with a focus in California and the Western Region. The review of resumes and qualifications will be conducted on all candidates who submit, allowing the Agency the ability to select from a broad field of qualified candidates. The professional services fee will be the fixed fee of \$47,500\*.

\*Note – Expenses included in this fixed fee include such items as advertisements, consultant interaction (anticipated to be done primarily through videoconferencing with the exception of one on-site trip), clerical, research, graphic design, verifications, and Internet and Lexis/Nexis searches on the top two candidates, and long-distance telephone charges. References will be conducted on the top candidate. Additional references conducted beyond the top candidate will be billed at the rate of \$1,800 per candidate.

Ralph Andersen & Associates is leveraging cloud-based applications to operate in a total virtual environment. All meetings and interviews (with the exception of finalist interviews) will be conducted by video (Zoom Technologies), all work products provided to the client will be electronically transmitted (properly organized and tabbed) using either DropBox or ShareFile.

Invoicing for Services – Ralph Andersen & Associates will bill the fixed fee to the Agency in four installments as follows:

- Upon Completion of the Brochure - \$14,250
- Following Closing Date - \$14,250
- Following Presentation of Finalist Candidates - \$14,250
- Upon Acceptance of Offer - \$4,750

Progress payments will be due upon receipt.

Brochure – A full-color informational brochure will be developed for the General Manager. All pictures will be the responsibility of the Agency. The Agency will also be responsible for ensuring that there are no copyright restrictions on the photographs supplied to Ralph Andersen & Associates and that the Agency will agree to pay any and all related charges or fines if a copyright violation is incurred either during the search itself or subsequently.

Exceptions – The Agency will be responsible for all costs associated with candidate travel to and from the finalist on-site interviews.

## Ralph Andersen & Associates' Guarantee

Ralph Andersen & Associates offers the industry-standard guarantee on our search services. If within a one-year period after appointment, the General Manager resigns or is dismissed for cause, we will conduct another search free of all charges for professional services. The Northern California Power Agency would be expected to pay for the reimbursement of all incurred expenses.

Should the initial outreach efforts not result in a successful placement, Ralph Andersen & Associates will continue the outreach efforts until the ideal candidate is found. The Agency will be responsible for expenses based on actual receipts.

# References

- Transmission Agency of Northern California (TANC)  
Contact: John Roukema, Former Interim General Manager  
Phone: (408) 621-5875  
Recruitment: General Manager
- Redding Electric Utility / City of Redding  
Contact: Nick Zettel  
Phone: (530) 949-7881  
Recruitment: General Manager

# PROPOSAL FOR EXECUTIVE RECRUITMENT SERVICES

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**General Manager  
Northern California Power Agency  
Roseville, California**

**Submission Due: September 18, 2025  
This proposal is valid for 90 days**

**Response to RFP for Executive Recruitment  
Service Providers**



Strategic Government Resources, Inc.  
P.O. Box 1642, Keller, Texas 76244  
Office: 817-337-8581

Darin Atteberry, Chief Executive Officer  
[DarinAtteberry@GovernmentResource.com](mailto:DarinAtteberry@GovernmentResource.com)



September 18, 2025

James "Bo" Sheppard, Chair, and Members of the Executive Committee  
Northern California Power Agency

Dear Mr. Sheppard and Committee Members,

On behalf of Strategic Government Resources, Inc. (SGR), a Texas corporation, I am pleased to submit this proposal to conduct the executive search for the next General Manager of the Northern California Power Agency (NCPA). SGR understands that recruiting a General Manager for NCPA requires a partner who grasps the unique complexities of both your joint powers authority structure and California's dynamic energy landscape. As a firm founded by former public sector leaders, we are uniquely positioned to find an executive who can build consensus among your 16 member agencies while championing NCPA's mission to deliver reliable, affordable, and clean power to over 700,000 Californians.

Highlights of our tailored approach for NCPA include:

- **Understanding Your Needs:** Our process is founded on a deep understanding of your unique needs. It begins with in-depth Stakeholder Interviews and Listening Sessions with your commission and key staff to gain a clear understanding of NCPA's unique challenges and strategic goals. For a JPA, this step is vital to ensure the final position profile reflects the priorities and perspectives of your entire membership.
- **Targeted National Outreach:** We will leverage our powerful network—including over 20,000 LinkedIn followers, 35,000 subscribers to our Servant Leadership e-newsletter, targeted profession-specific Job Alerts, and partnerships with key industry associations—to source a diverse pool of candidates with proven experience in managing complex energy portfolios, navigating dynamic regulatory environments, and leading advocacy efforts.
- **Rigorous Vetting for a Lasting Fit:** Our multi-stage evaluation process goes far beyond the resume. It includes written questionnaires, online interviews, media searches, and comprehensive background checks to ensure we present candidates who possess the technical skills and the leadership philosophy to thrive at NCPA.

Your Executive Recruiter, Senior Vice President **Clay Pearson**, brings over 30 years of local government experience. While with the City of Novi, Michigan, he led the successful attraction of ITC Holdings Corp., the largest independent electricity transmission company in the US, providing him with valuable insight into electric power organizations and their role in communities. As the executive sponsor of this search and a former Board Member of the Platte River Power Authority, I am intimately familiar with the perspective of your governing board and member agencies. My own personal ties to Roseville provide me with an additional vested interest in seeing NCPA, and the region it serves, continue to thrive.

Thank you for your consideration. We are enthusiastic about the prospect of partnering with you and are available to discuss our proposal in greater detail at your convenience.

Respectfully submitted,

Darin Atteberry, Chief Executive Officer

[DarinAtteberry@GovernmentResource.com](mailto:DarinAtteberry@GovernmentResource.com)

**XIV. INDEMNIFICATION**

Consulting firm shall indemnify, defend with counsel reasonably acceptable to the Agency, and hold harmless the Agency, and its officials, commissioners, officers, employees, agents and volunteers from and against all losses, liabilities, claims, demands, suits, actions, damages, expenses, penalties, fines, costs (including without limitation costs and fees of litigation), judgments and causes of action of every nature arising out of or in connection with any acts or omissions by Consulting firm, its officers, officials, agents, and employees, except as caused by the sole or gross negligence of Agency. Notwithstanding, should this Agreement be construed as a construction agreement under Civil Code section 2783, then the exception referenced above shall also be for the active negligence of the Agency.

**XV. ATTACHMENTS**

- Appendix "A": Consulting Services Agreement
- Appendix "B": General Manager Job Description

**PROPOSER:**

**Company:** Strategic Government Resources, Inc.

**Address:** PO Box 1642, Keller, TX 76244

**Signed:**  **Title:** Chief Executive Officer

**Print Name:** Darin Atteberry **Telephone:** (817) 337-8581

**E-mail:** DarinAtteberry@governmentresource.com **Date:** 09/18/2025

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## About SGR

Strategic Government Resources, Inc. (SGR) exists to help local governments become more successful by recruiting, assessing, and developing innovative, collaborative, and authentic leaders. SGR was incorporated in Texas in 2002 with the mission to facilitate innovative leadership in local government. SGR is fully owned by former City Manager Ron Holifield, who spent two high-profile decades in city management and served as a City Manager in several cities.

SGR's business model is truly unique. Although we are a private company, SGR operates like a local government association. Most of SGR's principals are former local government officials, allowing SGR to bring a perspective and depth of local government expertise to every project that no other firm can match.

SGR's Core Values are Customer Service, Integrity, Philanthropy, Continuous Improvement, Agility, Collaboration, Protecting Relationships, and the Golden Rule.

SGR is a full-service firm, specializing in providing solutions for local governments in the areas of recruitment and retention, leadership development and training, innovation and future readiness, and everything in between.

With 21 full-time employees, 21 recruiters, 18 facilitators, and multiple consultants who function as subject matter experts on a variety of projects, SGR offers comprehensive expertise.

The company operates as a fully remote organization, with team members located in Texas, Arizona, California, Colorado, Florida, Georgia, Maine, Michigan, Montana, Nevada, New York, North Carolina, Ohio, Oklahoma, and South Carolina.

View all SGR team members and their bios at: [GovernmentResource.com/Meet-the-Team](https://www.governmentresource.com/Meet-the-Team)

## SGR's Unique Qualifications

### Extensive Network of Prospects

SGR is intent on being a leader in executive recruitment and firmly believes in the importance of proactively building a workforce that reflects the diversity of the communities we serve. We leverage an extensive and diverse network to reach potential applicants.

- Your position will be announced in SGR's Servant Leadership e-newsletter, which reaches over 35,000 subscribers across all 50 states.
- We will send targeted, profession-specific emails to opt-in subscribers of SGR's Job Alerts.
- Your position will appear on SGR's Website which attracts approximately 20,000 visitors per month. [GovernmentResource.com/Open-Recruitments](https://www.governmentresource.com/open-recruitments)
- Your position will be posted on SGR's Job Board which typically has over 2,000 job listings at any given time and receives approximately 16,000 unique visitors per month. [SGRJobs.GovernmentResource.com](https://www.sgrjobs.governmentresource.com)
- SGR implements a comprehensive social media marketing campaign that includes custom-made graphics and distribution on SGR's LinkedIn page.
- We frequently collaborate with various local government associations, including the League of Women in Government, Alliance for Innovation, and the National Forum for Black Public Administrators.
- Approximately 65% of semifinalists selected by our clients learn about open recruitments through our website, servant leadership e-newsletter, job board, job alert emails, social media, or personal contact.

### Collective Local Government Experience

Our recruiters have decades of experience in local government, as well as regional and national networks of relationships. Our executive recruiters leverage the professional networks of all SGR recruiters when recruiting for a position, enabling outreach to a wide and diverse array of prospective applicants. SGR team members are active on a national basis in local government organizations and professional associations. Many SGR team members frequently speak and/or write on issues of interest to local government executives. SGR can navigate relevant networks as both peers and insiders.

### Equal Employment Opportunity

SGR is deeply committed to equal employment opportunity, emphasizing ethical recruitment practices free from bias. In our 2024, 33% of our placements were female and 31% were people of color. We partner with organizations like the League of Women in Government and the Local Government Hispanic Network to attract diverse talent and continuously refine our processes to ensure equity and inclusion in all our recruitment efforts.

### Listening to Your Unique Needs

SGR devotes significant time to actively listening to your organization and helping you define and articulate your needs. We work diligently to conduct a comprehensive recruitment process tailored specifically to your organization. SGR dedicates a prodigious amount of energy to understanding your organization's unique culture, environment, and local issues to ensure an alignment in terms of values, philosophy, and management style perspectives.

While we have established systems for achieving success, we are a “boutique” firm capable of adapting to meet a client's specific needs and providing insights on the pros and cons of their preferred approach.

### **Trust of Candidates**

SGR has a track record of providing remarkable confidentiality and wise counsel to candidates and next-generation leaders, earning their trust. As a result, we can bring exceptional prospects to the applicant pool. Candidates trust SGR to assess the situation accurately, communicate honestly, and maintain their confidentiality to the greatest extent possible.

### **Accessibility and Communication**

Your executive recruiter will keep you informed of the search status and will be readily accessible throughout the recruitment process. Candidates and clients can reach the recruiter at any time via cell phone or email. Additionally, the recruiter maintains communication with active applicants, ensuring they are well-informed about the community and the opportunity.

### **Comprehensive Evaluation and Vetting of Candidates**

SGR offers a comprehensive screening process designed to ensure a thorough understanding of candidate backgrounds and to minimize surprises. Our vetting process for a full-service recruitment includes the following key components:

- Prescreening questions and technical review of resumes
- Cross-communication among our recruiters regarding candidates who have been involved in previous searches, providing greater insight into their background and skills.
- Written questionnaires to gain insights beyond what is available through a resume.
- Recorded one-way semifinalist interviews.
- Media search reports incorporating both internet and social media results tailored to each candidate based on their previous places of residence and work.
- Thorough, automated, and anonymous reference checks that provide feedback on candidates from a well-rounded group of references.
- Background checks completed by a licensed private investigation firm.

### **Executive Recruitment Clients**

SGR has partnered on executive recruitments with more than 450 local government clients in 37 states. We take great pride in the long-term relationships we have developed with many of our clients who continue to partner with us on future recruitment needs.

## Project Personnel

### Clay Pearson, Senior Vice President

Email: [ClayPearson@governmentresource.com](mailto:ClayPearson@governmentresource.com)

Phone: 713-816-8639



Clay J. Pearson joins SGR as Senior Vice President after serving more than 30 years in local government. A seasoned city manager, Clay's career includes impactful roles in Fort Worth and Pearland, Texas; Novi, Michigan; and Elgin, Illinois, contributing to his expertise in community and economic development, budget and finance, public safety, and technology. His tenure in diverse states and situations, working with cities ranging from 60,000 to one million, has equipped him with experience, perspective and a unique ability to collaborate with elected officials and assist community leaders in transforming their visions into actionable plans. Clay holds a Bachelor's Degree in Economics from Gustavus Adolphus College (St. Peter, MN) and a Master of Public Administration from The University of Kansas. Clay served as Chair of the International City-County Management Association (ICMA) International Committee for multiple years and held various other leadership positions with ICMA, state associations, and the Alliance for Innovation (AFI). His global perspective and extensive network enhance his contributions to SGR and its clients.

Attending the University of Virginia Weldon Cooper Center for Public Service early in his career provided a foundation for creating High Performance Organizations. He has used that expertise to support teams, leadership at all levels, and understanding strategy to build up organizations across the country to be nimble and effective.

At SGR, Clay specializes in executive recruitment, bringing his wealth of knowledge and experience to support local governments nationwide. Clay is passionate about traveling and engaging with like-minded public servants. He lives near Houston with his wife Jennifer.

## **Darin Atteberry, Chief Executive Officer**

Email: [DarinAtteberry@governmentresource.com](mailto:DarinAtteberry@governmentresource.com)

Phone: 817-337-8581



Darin Atteberry is a seasoned leader with extensive experience in both the public and private sectors. A key highlight of Darin's experience is his service on the Board of Directors for the Platte River Power Authority, a generation and transmission utility in Colorado collectively owned by four municipalities. This role has provided him with a first-hand understanding of the unique governance, financial, and operational dynamics of utility service providers. He is intimately familiar with the collaborative leadership style required to balance the interests of multiple member communities while advancing a unified strategic vision.

Atteberry served as City Manager of Fort Collins, Colorado, from 1996 to 2021, where he built a strong reputation for collaborative leadership and balancing community needs with fiscal responsibility. In 2021, Atteberry transitioned to the private sector as Market President of Northern Colorado for Elevations Credit Union. His career spans a unique blend of public service and private sector expertise, positioning him as a versatile and influential figure.

Atteberry's leadership in Fort Collins was marked by significant achievements in environmental sustainability, economic vitality, and inclusivity. He spearheaded initiatives to reduce greenhouse gas emissions, promote renewable energy, and ensure robust public services. Under his guidance, Fort Collins received the prestigious Baldrige Performance Excellence Award, becoming the third U.S. city to achieve this honor for operational excellence.

Before his time in Fort Collins, Atteberry held various public sector roles across California, Georgia, and Washington, where he was known for his integrity, consensus-building skills, and ability to navigate complex challenges. His leadership earned him numerous accolades, including the Colorado Governor's Citizenship Medal, the ICMA Award for Career Excellence, and recognition as a BizWest Top 50 Most Influential Business Leader. He was also recognized in GovTech's Top 25 Doers, Dreamers, and Drivers for his exceptional leadership in local government, where he advanced innovative solutions in public service, sustainability, and operational excellence.

In addition to his professional accomplishments, Atteberry is a passionate advocate for civic engagement, contributing to various community and nonprofit organizations. He has served on multiple boards, including an eight-year tenure with the Alliance for Innovation, and has made a lasting impact on the organizations he has led, shaping them into models of responsible and innovative local government. Darin and his high school sweetheart, Deborah, have four adult children and four grandchildren.

# Approach and Methodology

A full-service recruitment typically entails the following steps:

- 1. Organization/Position Insight and Analysis**
  - Project Kickoff Meeting and Develop Anticipated Timeline
  - Stakeholder Interviews and Listening Sessions
  - Develop Recruitment Brochure
- 2. Recruitment Campaign and Communication with Candidates**
  - Advertising and Marketing
  - Sourcing Prospective and Active Candidates
  - Communication with Prospective Applicants
  - Communication with Active Applicants
- 3. Initial Screening and Review by Executive Recruiter**
- 4. Search Committee Briefing to Review Applicant Pool and Select Semifinalists**
- 5. Evaluation of Semifinalists**
  - Written Questionnaires
  - Online Semifinalist Interviews
  - Media Searches
- 6. Search Committee Briefing to Select Finalists**
- 7. Evaluation of Finalists**
  - Background Investigation Reports
  - DiSC Management Assessments (if desired, supplemental cost)
  - First Year Plan or Other Advanced Exercise
  - Press Release Announcing Finalists (if requested)
- 8. Interview Process**
  - Face-to-Face Interviews
  - Stakeholder Engagement (if desired)
  - Deliberations
  - Reference Checks (may occur earlier in process)
- 9. Negotiations and Hiring Process**
  - Determine Terms of an Employment Offer
  - Negotiate Terms and Conditions of Employment
  - Press Release Announcing New Hire (if requested)

## **Step 1: Organization/Position Insight and Analysis**

### **Project Kickoff Meeting and Develop Anticipated Timeline**

SGR will meet with the organization at the outset of the project to discuss the recruitment strategy and timeline. At this time, SGR will also request that the organization provide us with photos and information on the community, organization, and position to assist us in drafting the recruitment brochure.

### **Stakeholder Interviews and Listening Sessions**

Stakeholder interviews and listening sessions are integral to SGR's approach. SGR devotes tremendous energy to understanding your organization's unique culture, environment, and goals to ensure you get the right match for your specific needs. Obtaining a deep understanding of your organizational needs is the crucial foundation for a successful executive recruitment. In collaboration with the organization, SGR will compile a list of internal and external stakeholders to meet with regarding the position. These interviews and listening sessions will identify potential issues that may affect the dynamics of the recruitment and contribute to a comprehensive understanding of the position, special considerations, and the political environment. This process fosters organizational buy-in and will assist us in creating the position profile.

### **Develop Recruitment Brochure**

After the stakeholder meetings, SGR will develop a recruitment brochure, which will be reviewed and revised in partnership with your organization until we are in agreement that it accurately represents the sought-after leadership and management attributes. View sample recruitment brochures here: [GovernmentResource.com/Open-Recruitments](http://GovernmentResource.com/Open-Recruitments)

## **Step 2: Recruitment Campaign and Communication with Candidates**

### **Advertising and Marketing**

The Executive Recruiter and the client work together to determine the best ways to advertise and recruit for the position. SGR's Servant Leadership e-newsletter, with a reach of over 35,000 subscribers in all 50 states, will announce your position. Additionally, we will send targeted emails to opt-in subscribers of SGR's Job Alerts, and your position will be posted on SGR's website and Job Board. SGR provides a comprehensive social media marketing campaign that includes custom-made graphics and distribution on SGR's LinkedIn page. Furthermore, we will provide a recommended list of ad placements to be approved by the client, targeting the most effective venues for reaching qualified candidates for that particular position.

### **Sourcing Prospective and Active Candidates**

SGR's innovative recruitment strategies are designed to give our clients a competitive edge in attracting and retaining top-tier talent. By employing a dual approach of passive and active candidate sourcing, we tap into a broader talent pool that includes high-caliber professionals who may not be actively job-seeking. Our advanced technology and deep industry connections enable us to identify candidates with the precise skills and cultural fit for your organization. We round out sourcing efforts through personalized candidate engagement and outreach with a constant focus on transparency and relationship building.

### **Communication with Prospective Applicants**

SGR maintains regular communication with interested prospects throughout the recruitment process. Outstanding candidates often conduct thorough research on the available position before submitting

their resumes. As a result, we receive a significant number of inquiries, and it is crucial for the executive search firm to be well-prepared to respond promptly, accurately, and comprehensively, while also offering a warm and personalized approach. This initial interaction is where prospective candidates form their first impression of the organization, and it is an area in which SGR excels.

### **Communication with Active Applicants**

Handling the flow of resumes is an ongoing and significant process. On the front end, it involves tracking resumes and promptly acknowledging their receipt. It also involves timely and personalized responses to any questions or inquiries. SGR maintains frequent communication with applicants to ensure they remain enthusiastic and well-informed about the opportunity. Additionally, SGR communicates with active applicants, keeping them informed about the organization and community.

### **Step 3: Initial Screening and Review**

#### **SGR Executive Recruiter**

SGR uses a triage process to identify high-probability, medium-probability, and low-probability candidates. This triage ranking is focused on overall assessment based on interaction with the applicant, qualifications, any known issues concerning previous work experience, and evaluation of cultural fit with the organization. In contrast with the triage process, which focuses on subjective assessment of the resumes and how the candidates present themselves, we also evaluate each candidate to ensure that the minimum requirements of the position are met and determine which preferred requirements are satisfied. This sifting process examines how well candidates' applications align with the recruitment criteria outlined in the position profile.

#### **Candidate Landing Page / Recruitment Portal**

At a time agreed upon by SGR and the Search Committee, SGR can provide access to an online portal for designated stakeholders. This portal allows authorized users to individually screen and review applications and related materials, as desired, while the recruitment is still managed by SGR and facilitated by your Executive Recruiter. While this access is provided to authorized users, strict security measures remain in place to protect candidates' identities and the confidentiality of the recruitment against unauthorized access.

### **Step 4: Search Committee Briefing to Review Applicant Pool and Select Semifinalists**

At this briefing, SGR will conduct a comprehensive presentation to the Search Committee and facilitate the selection of semifinalists. The presentation will include summary information on the process to date, outreach efforts, the candidate pool demographics, and any identified trends or issues. Additionally, a briefing on each candidate and their credentials will be provided.

### **Step 5: Evaluation of Semifinalists**

The review of resumes is a crucial step in the executive recruitment process. However, resumes may not fully reveal an individual's personal qualities and their ability to collaborate effectively with others. In some instances, resumes might also tend to exaggerate or inflate accomplishments and experience.

At SGR, we understand the significance of going beyond the surface level of a resume to ensure that candidates who progress in the recruitment process are truly qualified for the position and a suitable match for the organization. Our focus is to delve deeper and gain a comprehensive understanding of the

person behind the resume, identifying the qualities that make them an outstanding prospect for your organization.

During the evaluation of semifinalist candidates, we take the initiative to follow up when necessary, seeking clarifications or additional information as needed. This approach ensures that we present you with the most qualified and suitable candidates for your unique requirements. At SGR, our ultimate goal is to match your organization with individuals who possess not only the necessary qualifications but also the qualities that align with your organizational culture and values.

### **Written Questionnaires**

As part of our thorough evaluation process, SGR will request semifinalist candidates to complete a comprehensive written exercise. This exercise is designed to gain deeper insight into the candidates' thought processes and communication styles. Our written instrument is customized based on the priorities identified by the Search Committee. The completed written instrument, along with cover letters and resumes submitted by the candidates, will be included in the semifinalist briefing book.

### **Online Semifinalist Interviews**

Online interviews will be conducted for semifinalist candidates. This approach provides an efficient and cost-effective way to gain additional insights to aid in selecting finalists to invite for an onsite interview. The interviews allow the Search Committee to evaluate technological competence, demeanor, verbal communication skills, and on-camera presence. Additionally, virtual interviews provide an opportunity for the Search Committee to ask candidates questions on specific topics of special interest.

### **Media Searches**

Our media search process involves web-based and social media research, enabling efficient and thorough vetting of candidates and minimizing the risk of overlooking critical information. These media reports have proven helpful by uncovering issues that may not have been previously disclosed by prospective candidates. The recruiter will communicate any "red flags" or noteworthy media coverage to the Search Committee as part of the review of semifinalists with the Search Committee.

## **Step 6: Search Committee Briefing to Select Finalists**

Prior to this briefing, SGR will provide the Search Committee with a briefing book on the semifinalist candidates via an electronic link. The briefing book includes cover letters, resumes, and completed questionnaires.

If applicable, a separate email with the link to view the recorded online interviews is sent to the Search Committee. The objective of this meeting is to narrow the list to finalists who will be invited to participate in onsite interviews.

## **Step 7: Evaluation of Finalists**

### **Background Investigation Reports**

Through SGR's partnership with a licensed private investigation firm, we are able to provide our clients with comprehensive background screening reports that include the detailed information listed below.

- Social security number trace
- Address history
- Driving record (MVR)
- Federal criminal search
- National criminal search
- County warrants and warrants for counties where candidate has lived or worked in previous 10 years
- County civil and criminal search for counties where candidate has lived or worked in previous 10 years
- Education verification

- Global homeland security search
- Sex offender registry search
- State criminal court search for states where candidate has lived in previous 10 years
- Employment verification for previous 10 years (if requested)
- Military verification (if requested)
- Credit report (if requested)

### **DiSC Management Assessments (if desired, supplemental cost)**

SGR utilizes the DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management assessment provides a comprehensive analysis and report on the candidate's preferences in five crucial areas: management style, directing and delegating, motivation, development of others, and working with their own manager.

For assessments of more than two candidates, a DiSC Management Comparison Report is included, offering a side-by-side view of each candidate's preferred management style. V

### **First-Year Plan or Other Advanced Exercise**

SGR will collaborate with your organization, if desired, to create an advanced exercise for the finalist candidates. One such example is a First-Year Plan, where finalist candidates are encouraged to develop a first-year plan based on their current understanding of the position's opportunities and challenges. Other exercises, such as a brief presentation on a topic to be identified by the Recruiter and Search Committee, are also typically part of the onsite interview process to assess finalists' communication and presentation skills, as well as critical analysis abilities.

## **Step 8: Interview Process**

### **Face-to-Face Interviews**

SGR will arrange interviews at a date and time convenient for your organization. This process can be as straightforward or as elaborate as your organization desires. SGR will aid in determining the specifics and assist in developing the interview schedule and timeline. We will provide sample interview questions and participate throughout the process to ensure it runs smoothly and efficiently.

### **Stakeholder Engagement**

At the discretion of the Search Committee, we will closely collaborate with your organization to involve community stakeholders in the interview process. Our recommendation is to design a specific stakeholder engagement process after gaining deeper insights into the organization and the community. As different communities require distinct approaches, we will work together to develop a tailored approach that addresses the unique needs of the organization.

### **Deliberations**

SGR will facilitate a discussion about the finalist interviews and support the Search Committee in making a hiring decision or determining whether to invite one or more candidates for a second interview.

### **Reference Checks**

SGR uses a progressive and adaptive automated reference check system to provide insights on candidates' soft skills from a well-rounded group of references. References may include elected officials, direct supervisors, direct reports, internal organizational peers, professional peers in other organizations, and civic leaders. SGR's reference check platform is anonymous, proven to encourage more candid and truthful responses, thus providing organizations with more meaningful and insightful information on candidates. SGR delivers a written summary report to the organization once all reference checks are completed. The timing of reference checks may vary depending on the specific search process and

situation. If finalists' names are made public prior to interviews, SGR will typically contact references before the interview process. If the finalists' names are not made public prior to interviews, SGR may wait until the organization has selected its top candidate before contacting references to protect candidate confidentiality.

## **Step 9: Negotiations and Hiring Process**

### **Determine Terms of an Employment Offer**

Upon request, SGR will provide draft employment agreement language and other helpful information to aid in determining an appropriate offer to extend to your preferred candidate.

### **Negotiate Terms and Conditions of Employment**

SGR will assist to whatever degree you deem appropriate in conducting negotiations with the chosen candidate. SGR will identify and address any special needs or concerns of the selected candidate, including potential complicating factors. With our experience and preparedness, SGR is equipped to facilitate win-win solutions to resolve negotiation challenges.

### **Press Release (if requested)**

Until employment negotiations are finalized, you should exercise caution to avoid the embarrassment of a premature announcement that may not materialize. It is also considered best practice to notify all senior staff and unsuccessful candidates before any media exposure. SGR will assist in coordinating this process and in crafting any necessary announcements or press releases.

### **Satisfaction Surveys**

SGR is committed to following the golden rule, which means providing prompt, professional and excellent communication while always treating every client with honor, dignity and respect. We request clients and candidates to participate in a brief and confidential survey after the completion of the recruitment process. This valuable feedback assists us in our ongoing efforts to improve our processes and adapt to the changing needs of the workforce.

### **Post-Hire Services**

As part of our commitment to ensuring long-term success, SGR is pleased to offer a complimentary, four-hour, leadership development workshop for your organization within 12 months of the successful completion of the executive search. SGR Executive Recruitment clients would be responsible for the travel costs associated with facilitation only—no professional fee (a cost savings of up to \$4,750)! Leadership development workshops are designed to support the newly appointed leader and foster a servant leadership culture within your team, enhancing collaboration and alignment across the organization. Standard leadership development workshops include the following topics:

- Creating a Servant Leadership Culture
- Governance
- Team Building
- Strategic Planning
- Strategic Visioning

We offer additional post-hire services such as executive coaching, team-building retreats, and performance review assistance at the six-month or one-year mark. For more information or to request a customized proposal, please email [training@governmentresource.com](mailto:training@governmentresource.com) or visit:

[GovernmentResource.com/leadership-and-professional-development/leadership-development-services/](http://GovernmentResource.com/leadership-and-professional-development/leadership-development-services/)

## Typical Timeline

The timeline below is an example only, and we will work with you to finalize and approve a timeline, with adjustments made if needed after the position is posted. \*

Initial Steps Prior to Posting Position:	
<ul style="list-style-type: none"> <li>● Contract Execution</li> <li>● Kickoff Meeting to Discuss Recruitment Strategy and Timeline</li> <li>● Organization/Position Insight and Analysis</li> <li>● Stakeholder Interviews and Listening Sessions</li> <li>● Deliverable: Draft Recruitment Brochure</li> <li>● Deliverable: Recommended Ad Placements</li> <li>● Organization Approves Ad Placements</li> <li>● Search Committee Reviews and Approves Brochure</li> </ul>	<p><i>Timing varies. Estimated to take 2 weeks.</i></p>

Task	Week
<ul style="list-style-type: none"> <li>● Post Position and Firm up Timeline</li> <li>● Recruitment Campaign and Outreach to Prospective Applicants</li> <li>● Initial Screening and Review by Executive Recruiter</li> </ul>	Weeks 1-4
<ul style="list-style-type: none"> <li>● Search Committee Briefing to Review Applicant Pool and Select Semifinalists</li> </ul>	Week 5
<ul style="list-style-type: none"> <li>● Questionnaires</li> <li>● Online Semifinalist Interviews</li> <li>● Media Searches</li> </ul>	Week 6
<ul style="list-style-type: none"> <li>● Deliverable: Semifinalist Briefing Books via Electronic Link</li> <li>● Deliverable: Recorded Online Interviews, if applicable</li> </ul>	Week 7
<ul style="list-style-type: none"> <li>● Search Committee Briefing to Select Finalists</li> </ul>	Week 8
<ul style="list-style-type: none"> <li>● Background Investigation Reports</li> <li>● Disc Management Assessments (if desired, supplemental cost)</li> <li>● First-Year Plan or Other Advanced Exercise (if desired)</li> </ul>	Weeks 9-10
<ul style="list-style-type: none"> <li>● Deliverable: Finalist Briefing Books via Electronic Link</li> </ul>	Week 11
<ul style="list-style-type: none"> <li>● Face-to-Face Interviews</li> <li>● Stakeholder Engagement (if desired)</li> <li>● Deliberations</li> <li>● Reference Checks (may occur earlier in process)</li> <li>● Negotiations and Hiring Process</li> </ul>	Week 12

\* Timeline is dependent upon Search Committee availability and Holidays. Organization agrees to timely provide photos/graphics and information necessary to develop recruitment brochure, narrow candidate field, and conduct candidate screening; failure to do so, may in SGR's reasonable discretion, extend timeline and can negatively impact the outcome of the process.

# Fee Proposal

**Not-to-Exceed Price: \$29,919**

**Not-to-Exceed Price is comprised of:**

- **Fixed Fee of \$27,419**
- **Up to \$2,500 in Ad Placements (billed at actual cost)**

**The Fixed Fee includes:**

- Stakeholder Interviews and Listening Sessions
- Production of a Professional Recruitment Brochure
- Recruitment Campaign and Outreach:
  - Outreach to Prospective Applicants
  - Custom Graphics for Email and Social Media Marketing
  - Announcement in SGR's Servant Leadership e-Newsletter
  - Post on SGR's Website
  - Ad on SGR's Job Board
  - Two (2) Targeted Job Blasts to SGR's Opt-In Subscriber Database
  - Promotion on SGR's LinkedIn
- Application Management, Screening, and Evaluation
- Semifinalist Evaluation:
  - Questionnaires for up to 15 Semifinalists
  - Online Interviews for up to 15 Semifinalists
  - Media Searches for up to 15 Semifinalists
- Semifinalist Briefing Books via Electronic Link
- Background Investigation Reports for up to Five (5) Finalists
- Finalist Briefing Books via Electronic Link
- Reference Checks for up to Five (5) Finalists
- Up To Two (2) Onsite Visits by the Recruiter for 1-3 days each, Inclusive of Travel Costs

**Reimbursable Expenses included in the not-to-exceed price:**

- Ad placements up to \$2,500 will be billed at the actual cost with no markup for overhead and are incorporated into our not-to-exceed price.

**Reimbursable Expenses not included in the not-to-exceed price:**

- Ad placements over and above \$2,500 will be billed back at actual cost with no markup for overhead.

**Supplemental Services/Other Expenses not included in the fixed or not-to-exceed price:**

- There may be additional charges for substantial and substantive changes made to the recruitment brochure after the brochure has been approved by the Organization and the position has been posted online. Organization would be notified of any supplemental costs prior to changes being made.

- At your request, SGR can conduct an online stakeholder survey for \$1,531 to help identify key issues or priorities that you may want to consider prior to launching the search. SGR provides recommended survey questions and sets up an online survey. Stakeholders are directed to a web page or invited to take the survey by email. A written summary of results is provided to the Organization. Please note that this type of survey may extend the recruitment timeline.
- Additional questionnaires over and above the 15 included in the Fixed Fee - \$230 per candidate.
- Additional online interviews over and above the 15 included in the Fixed Fee - \$256 per candidate.
- Additional media search reports over and above the 15 included in the Fixed Fee - \$766 per candidate.
- Additional background investigation reports over and above the maximum of five (5) included in the fixed price above - \$511 per candidate.
- Additional reference checks over and above the maximum of five (5) included in the fixed price above - \$256 per candidate.
- DiSC Management assessments - \$179 per candidate.
- Semifinalist and finalist briefing materials will be provided to the Organization via an electronic link. Should the Organization request printing of those materials, the reproduction and shipping of briefing materials will be outsourced and be billed back at actual cost.
- Additional onsite visits by the recruiter over and above the quantity included in the fixed price are an additional cost. Travel time and onsite time are billed at a professional fee of \$1,021 per day. Meals are billed back at a per diem rate of \$18 for breakfast, \$20 for lunch, and \$32 for dinner. Mileage will be reimbursed at the current IRS rate. All other travel-related expenses are billed back at actual cost with no markup for overhead.
- SGR Executive Recruitment clients wishing to utilize the complimentary leadership development workshop would be responsible for the travel costs associated with facilitation only. Meals are billed back at a per diem rate of \$18 for breakfast, \$20 for lunch, and \$32 for dinner. Mileage will be reimbursed at the then-current IRS rate. All other travel-related expenses are billed back at actual cost with no markup for overhead.
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.
- If the organization desires any supplemental services not mentioned in this fee proposal, an estimate of the cost will be provided at that time, and no work shall be done without approval.

### **Billing**

SGR will bill the fixed fee in three (3) installments: 35% upon contract execution, 35% after the applicant pool is presented, and 30% after finalist interviews. Ad placement expenses and supplemental services/other expenses will be billed as incurred or provided. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

## Terms and Conditions

- The organization agrees not to discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status, or any other basis that is prohibited by federal, state, or local law.
- The organization agrees to refer all prospective applicants to SGR and not to accept applications independently during the recruitment process.
- The organization agrees to provide SGR with any candidates that were previously accepted as applicants for the given position before engaging SGR to conduct the recruitment for the subject position.
- If the organization wishes to place ads in local, regional, or national newspapers, the organization shall be responsible for paying directly for the ads and for placing the ads using language provided by SGR.
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.

## Placement Guarantee

SGR is committed to your satisfaction with the results of our full service recruitment process. If, for any reason, you are not satisfied, we will repeat the entire process one additional time, and you will be charged only for expenses as described in the Fee Proposal under Supplemental Services. Additionally, we promise not to directly solicit any candidate selected under this engagement for another position while they are employed with your organization.

In the event that you select a candidate fully vetted by SGR, who subsequently resigns or is released for any reason within 12 months of their hire date, we are committed to conducting a one-time additional executive search to identify a replacement. In this case, you will only be charged for related expenses as described in the Fee Proposal.

If your organization circumvents SGR's recruitment process and selects a candidate who did not participate in the full recruitment process, the placement guarantee will be null and void. Additionally, SGR does not provide a guarantee for candidates placed as a result of a partial recruitment effort or limited scope recruitment.

## SGR Similar Recruitments

### Public Works, Utilities, & Engineering Recruitments, 2019-Present

#### In Progress

- Bee Cave, TX (pop. 9,100) - City Engineer \*
- Bell County, TX (pop. 400,000) - County Engineer
- Lamar, CO (pop. 7,700) - Deputy Public Works Director
- **Springfield Utility Board, OR - General Manager**

#### 2025

- Argyle, TX (pop. 5,750) - Public Works Director
- Bartow, FL (pop. 20,000) - Utilities Director
- Durango, CO (pop. 56,600) - Assistant Public Works Director/Utilities
- Flagler Beach, FL (pop. 5,300) - City Engineer \*
- Greenville, TX (pop. 29,600) - Public Works Director \*
- Lake Region Lakes Management District, FL - District Manager
- Laredo, TX (pop. 256,000) - Utilities Director
- Nassau County, FL (pop. 101,500) - Utility Authority Executive Director \*
- Port Arthur, TX (pop. 57,000) - Director of Public Services/City Engineer
- Van Alstyne, TX (pop. 8,900) - Public Works Director \*
- Safford, AZ (pop. 10,300) - Utilities Director \*
- Sedalia, MO (pop. 22,000) - City Engineer
- Sunnyvale, TX (pop. 9,100) - Assistant Town Engineer \*

#### 2024

- Amarillo, TX (pop. 200,000) - Director of Utilities
- Brownsville, TX (pop. 186,700) - Director of Engineering & Public Works \*
- Chester County, PA (pop. 540,000) - Public Services Director
- Fort Worth, TX (pop. 900,000) - Property Management Director
- Greenville, TX (pop. 30,000) - Public Works Director \*
- Gulf Shores, AL (pop. 16,000) - City Engineer
- Indian River County, FL (pop. 165,000) - Public Works Director
- Manhattan, KS (pop. 55,000) - Director of Utilities
- North Texas Municipal Water District, TX - Engineering Manager
- North Texas Municipal Water District, TX - Water Treatment Systems Manager
- Olathe, KS (pop. 152,500) - Assistant City Engineer \*
- Richardson, TX (pop. 122,570) - Director of Engineering and Capital Projects
- Waco, TX (pop. 140,000) - Capital Division Manager \*
- Wake County, NC (pop. 1,000,000) - Director of General Services Administration
- **West Central Texas Municipal Water District, TX - General Manager**
- Wichita Falls, TX (pop. 103,000) - Deputy Director of Public Works \*

#### 2023

- Bay City, TX (pop. 18,000) - Public Works Director
- Cameron, MO (pop. 8,000) - Public Works Director
- **Cherokee Water Company, TX - General Manager**
- Fort Worth, TX (pop. 900,000) - Transportation and Public Works Director
- Grand Prairie, TX (pop. 200,000) - Utility Director \*
- Klamath Falls, OR (pop. 22,000) - Assistant City Engineer \*
- Lake Jackson, TX (pop. 28,000) - Assistant City Engineer \*
- Lubbock, TX (pop. 266,000) - Assistant Director of Water Utilities

- Lubbock, TX (pop. 266,000) - Director of Facilities Management
- Moline, IL (pop. 42,000) - Director of Public Works
- North Texas Municipal Water District - Assistant Deputy-Wastewater
- Olathe, KS (pop. 152,000) - Assistant City Engineer/Transportation Manager \*
- Richardson, TX (pop. 122,000) - Director of Facilities and Fleet
- San Juan County, WA (pop. 19,000) - Fleet Services Director
- Terrell, TX (pop. 18,000) - Director of Utilities
- Waco, TX (pop. 140,000) - Utilities Capital Projects Division Manager \*
- Waco, TX (pop. 140,000) - Utilities Plant Operations Manager \*
- Waco, TX (pop. 140,000) - Wastewater Treatment Plant Superintendent \*
- Westminster, CO (pop. 119,000) - City Engineer
- Westminster, CO (pop. 119,000) - Public Works and Utilities Director

## 2022

- Amarillo, TX (pop. 200,000) - Director of Utilities
- Aurora, CO (pop. 385,000) - Assistant Director of Water Operations
- Brookings, SD (pop. 24,000) - Public Works Director \*
- Cameron, MO (pop. 8,000) - Public Works Director
- **Canadian River Municipal Water Authority, TX - General Manager**
- **Canyon Regional Water Authority, TX - General Manager**
- Colorado River Municipal Water District, TX - Engineering Services Manager
- Columbia, MO (pop. 125,000) - Public Works Director \*
- Euless, TX (pop. 61,000) - Assistant Director of Public Works and Engineering \*
- Fort Smith, AR (pop. 90,000) - Director of Solid Waste Services \*
- Fort Smith, AR (pop. 90,000) - Deputy Director of Water/Sewer Line Maintenance \*
- Glenpool, OK (pop. 14,000) - City Engineer \*
- Government Services Group, Inc. - Assistant MSD Director
- Indian River County, FL (pop. 160,000) - Director of Utility Services \*
- Indian River County, FL (pop. 160,000) - Water-Wastewater Operations Manager \*
- Klamath Falls, OR (pop. 22,000) - City Engineer \*
- Lubbock Power & Light, TX (pop. 266,000) - Director of Customer Service
- Mesa, AZ (pop. 504,000) - Assistant City Engineer
- Plano, TX (pop. 287,000) - Assistant Director of Public Works, Community Services \*
- Plano, TX (pop. 287,000) - Assistant Director of Public Works, Streets & Traffic \*
- Plano, TX (pop. 287,000) - Assistant Director of Public Works, Water-Wastewater \*
- Richardson, TX (pop. 119,000) - Assistant Director of Capital Projects and Engineering \*
- Snoqualmie, WA (pop. 14,000) - Parks & Public Works Director
- Terrell, TX (pop. 17,000) - City Engineer
- Victoria, TX (pop. 67,000) - Assistant Director of Public Works/Utilities
- Waco, TX (pop. 140,000) - Wastewater Treatment Plant Superintendent \*

## 2021

- Broken Arrow, OK (pop. 110,000) - Director of Maintenance Services\*
- Broken Arrow, OK (pop. 110,000) - Director of Solid Waste & Recycling \*
- Cecil County Government, MD (pop. 105,000) - Deputy Director of Public Works \*
- **Dallas County Park Cities Municipal Utility District, TX - General Manager**
- DeLand, FL (pop. 37,000) - Public Services Director
- DeLand, FL (pop. 37,000) - Public Works Director
- Denton, TX (pop. 138,000) - Director of Water & Wastewater
- Ennis, TX (pop. 20,000) - Project Manager-Engineer \*
- Georgetown, TX (pop. 70,000) - Water Utilities Director
- Great Falls, MT (pop. 59,000) - City Engineer \*
- Green Valley Special Utility District, TX - Assistant General Manager
- Leander, TX (pop. 56,000) - Executive Director of Infrastructure

- McKinney, TX (pop. 195,000) - Public Works Director
- Orange, TX (pop. 18,000) - Assistant Public Works Director \*
- San Angelo, TX (pop. 100,000) - City Engineer \*
- San Marcos, TX (pop. 65,000) - Assistant Director of Public Services \*
- Sandy, OR (pop. 12,000) - Public Works Director \*
- **South Grayson Special Utility District, TX - General Manager \***
- Texas City, TX (pop. 50,000) - Director of Planning/City Engineer
- Wilmer, TX (pop. 4,700) - Public Works Director \*

## 2020

- Addison, TX (pop. 15,000) - Director of Public Works and Engineering Services
- Brevard County, FL (pop. 500,000) - Public Works Director \*
- Des Moines Water Works, IA - Director of Water Production \*
- Fernandina Beach, FL (pop. 12,000) - Deputy City Manager/City Engineer \*
- Fort Lauderdale, FL (pop. 182,000) - Assistant Director of Public Works
- Fort Lauderdale, FL (pop. 182,000) - Director of Public Works
- Fort Smith, AR (pop. 90,000) - Deputy Director of Water & Sewer Line Maintenance \*
- Irving, TX (pop. 234,000) - Solid Waste Services Director
- Ormond Beach, FL (pop. 41,000) - Utilities Manager
- Portland, TX (pop. 23,000) - Director of Public Works \*
- Reeves County, TX (pop. 15,000) - Road & Bridge Engineer
- Richardson, TX (pop. 115,000) - Assistant Director of Public Services \*
- Temple, TX (pop. 79,000) - Assistant Director of Purchasing and Facility Services \*
- The Colony, TX (pop. 44,000) - Director of Public Services
- **Trophy Club Municipal Utility District No. 1, TX - General Manager**
- Waco, TX (pop. 140,000) - Director of Solid Waste \*

## 2019

- Amarillo, TX (pop. 200,000) - Director of Utilities \*
- Amarillo, TX (pop. 200,000) - Solid Waste Superintendent
- Amarillo, TX (pop. 200,000) - Traffic Engineer \*
- Austin, TX (pop. 951,000) - Director of Austin Resource Recovery
- Baytown, TX (pop. 82,000) - Assistant Director of Engineering/Public Works (Capital Projects)
- Bozeman, MT (pop. 45,000) - Director of Public Works
- Brighton, CO (pop. 40,000) - Assistant Utilities Director \*
- Brighton, CO (pop. 40,000) - Assistant Public Works Director \*
- Broken Arrow, OK (pop. 115,000) - Engineering and Construction Director \*
- Fort Smith, AR (pop. 90,000) - Utilities Director \*
- HVJ Associates, TX - Vice President of Civil Design \*
- Port St. Lucie, FL (pop. 185,000) - Public Works Director \*
- Rowlett, TX (pop. 62,000) - Director of Public Works \*
- Temple, TX (pop. 79,000) - Assistant Director of Public Works-Utilities \*
- Texas City, TX (pop. 51,000) - Director of Public Works \*
- Waco, TX (pop. 130,000) - Director of Public Works \*

\* Limited scope recruitment

## References

### **West Central Texas Municipal Water District**

*Search: General Manager, 2024*

Norm Archibald, Board Member

[norm@hendrickhealth.org](mailto:norm@hendrickhealth.org)

325-668-4484

### **Canadian River Municipal Water Authority**

*Search: General Manager, 2022*

Chad Pernell, Deputy General Manager

[pernell@crmwa.com](mailto:pernell@crmwa.com)

806-865-3257

### **Chester County, Pennsylvania**

*Search: Public Services Director, 2024*

David A. Byerman, Chief Executive Officer

[dbyerman@chesco.org](mailto:dbyerman@chesco.org)

610-344-6026

### **City of Amarillo, Texas**

*Search: Utilities Director, 2024*

Mitchell Normand, Director of Human Resources

[Mitchell.normand@amarillo.gov](mailto:Mitchell.normand@amarillo.gov)

806-378-4294

## Acknowledgement of Agreement and Statement of Exceptions

### **Requested Exception to NCPA's Consulting Services Agreement**

While we maintain adequate liability insurance limits, including umbrella policies, our automobile liability insurance includes hired autos, scheduled autos, and non-owned autos. Our only owned vehicle is covered as a scheduled auto, so we respectfully request a modification to the requirements (Section 4.2.2. Specimen certificates are attached for reference.

### **Requested Addition to NCPA's Consulting Services Agreement**

To protect applicants and the relationship with their current employees, we respectfully request the following be incorporated into the resulting agreement:

"If the Agency receives an open records request, the Agency shall notify and share the request with the Consultant in writing as soon as possible but within no more than three (3) business days of receipt and that the Agency shall provide sufficient time for the Consultant to notify and provide advance notice to the impacted individuals prior to the Agency releasing the required information with protected information redacted."



# UTILITIES DIRECTOR

Support Division

**Annual Salary:**

\$97,760 – \$145,308 (DOE/DOQ)

Safford, Arizona

**Are you a visionary, solutions-oriented utilities executive who can lead complex capital projects, mentor staff, and build strong regional partnerships?**

If so, apply to be the City of Safford's next Utilities Director!

We're looking for an exceptional, forward-thinking leader who is:

- Experienced in managing large-scale utility infrastructure capital projects
- Skilled at stakeholder engagement and collaborative problem-solving
- Adept at fostering high-performing teams with accountability and professional growth

*Safford – a full-service community with small-town values and big opportunities – read on to learn more about this exciting role!*

# ABOUT THE COMMUNITY

Safford is a thriving, rural city in Southeastern Arizona's Gila Valley, serving as the major hub for Graham County. Known for its historic roots, tight-knit community, and stunning desert-mountain scenery, Safford balances a rich agricultural and mining heritage with a modern, service-driven economy.

Located about 100 miles northeast of Tucson near Mt. Graham, Safford offers abundant outdoor activities like hiking, boating, and birdwatching, plus educational and cultural attractions such as the Discovery Park Campus and the Mt. Graham International Observatory.

Historically founded in 1874 and incorporated in 1901, today Safford blends its historic downtown with progressive infrastructure and high-quality public services.



## GOVERNANCE & ORGANIZATION

The City of Safford operates under a council-manager form of government. The Mayor and six councilmembers are elected at-large for four-year, staggered terms with no term limits. <sup>21</sup>



POPULATION  
**10,257**



MEDIAN HOUSEHOLD INCOME  
**\$65,727**



MEDIAN HOME VALUE  
**\$191,600**

AVERAGE MONTHLY RENT  
**\$976**

[Tourism & Activities](#)



[History](#)





## ABOUT THE JOB

The Support Division provides leadership and oversight to Safford’s utilities services, including water, wastewater, gas, electric, meter operations, and customer service.

Reporting to the City Manager, the new Utilities Director will:

- Plan and execute large-scale capital improvement projects
- Oversee water reuse and long-term water infrastructure initiatives
- Develop and manage budgets, rates, and utility policies
- Represent Safford on the Southwest Public Power Agency Board
- Champion operational excellence, innovation, and customer service

Full Job Description



### ORGANIZATION DIVISIONS

- WATER
- WASTEWATER
- GAS
- ELECTRIC
- METER SERVICES

### ORGANIZATION QUICKFACTS



CITY EMPLOYEES

~230



CITY BUDGET

~\$82  
MILLION

### KEY PROJECTS FOR 2025

- REGIONAL WATER REUSE COLLABORATION AND GRANT PURSUIT
- DEVELOPMENT OF A NEW ELECTRICAL SUBSTATION
- LONG-TERM WATER INFRASTRUCTURE PLANNING

# THE IDEAL CANDIDATE

The next Utilities Director for the City of Safford will be a dynamic, forward-thinking leader who brings both vision and practical experience to this critical role. They will demonstrate:

- High emotional intelligence and excellent communication skills
- Collaboration and building partnerships and trust with staff, City Departments, City Council, and diverse community and regional stakeholders
- Initiative and proactive approach in identifying timely, cost-effective and sustainable solutions for complex issues
- A proven track record of managing large-scale utility infrastructure projects to completion



# EXPERIENCE & QUALIFICATIONS

## Required:

- Bachelor's Degree in Engineering, Environmental Sciences, Urban/Regional Planning, Geography, Public or Business Administration, Business Management, or a related field
- Five years of progressively responsible management experience in utilities with three to five years of project management experience in capital projects or utility operations



# SALARY & BENEFITS

- **Compensation:** \$97,760 – \$145,308 DOE/DOQ
- **Health Benefits:** 90% employer-paid health, dental, and vision; EPO or high-deductible plan options
- **Paid Leave:** Vacation and sick leave
- **Retirement:** Arizona State Retirement System with current employee and employer contribution rate of 12%
- **Additional Perks:**
  - ◆ City-provided cell phone
  - ◆ Up to \$4,000 in relocation reimbursement
  - ◆ Professional development opportunities



## HOW TO APPLY

Apply Here



For more information on this position, contact:

**Debra Stapleton, Senior Vice President**

DebraStapleton@GovernmentResource.com | 602-206-3536

*The City of Safford is an Equal Opportunity Employer and values diversity in its workforce. Applicants selected as finalists will be subject to a comprehensive background check.*



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

06/18/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b>  <b>Trutela Insurance, LLC</b> <b>8200 Windway Dr</b> <b>Windcrest, TX 78239</b>	<b>CONTACT NAME:</b> Jamie Intriago <b>PHONE (A/C, No, Ext):</b> 210-757-4520 <b>E-MAIL ADDRESS:</b> jamie.intriago@trutela.com	<b>FAX (A/C, No):</b>	
	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
<b>INSURED</b>  <b>STRATEGIC GOVERNMENT RESOURCES, INC</b> <b>P.O. BOX 1642</b> <b>KELLER, TX 76244</b>	<b>INSURER A:</b> Chubb Group		<b>10052</b>
	<b>INSURER B:</b>		
	<b>INSURER C:</b>		
	<b>INSURER D:</b>		
	<b>INSURER E:</b>		
<b>INSURER F:</b>			

**COVERAGES**

CERTIFICATE NUMBER: 00103581-0

REVISION NUMBER: 7

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$	
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$	
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$	
<b>A</b>	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	<b>Y</b>	<b>N/A</b>	<b>71840063</b>	<b>04/30/2025</b>	<b>04/30/2026</b>	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ <b>1,000,000</b> E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b> E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

<b>Strategic Government Resources, Inc., DBA SGR</b> <b>6502 Glen Abbey</b> <b>Abilene, TX 79606</b>	<b>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</b>  <b>AUTHORIZED REPRESENTATIVE</b>   <b>(JAI)</b>
--	---

**WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT**

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule. (This agreement applies only to the extent that you perform work under a written contract that requires you to obtain this agreement from us.)

This agreement shall not operate directly or indirectly to benefit anyone not named in the Schedule.

Schedule

Any person or organization against whom you have agreed to waive your right of recovery in a written contract, provided such contract was executed prior to the date of loss.

For policies or exposure in Missouri:

Any person or organization for which the employer has agreed by written contract, executed prior to loss, may execute a waiver of subrogation. However, for purposes of work performed by the employer in Missouri, this waiver of subrogation does not apply to any construction group of classifications as designated by the waiver of right to recover from others (subrogation) rule in our manual.

This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated. (The information below is required only when this endorsement is issued subsequent to preparation of the policy.)

Endorsement Effective **05-06-25**      Policy No. **71840063**  
Insured **STRATEGIC GOVERNMENT RESOURCES, INC.**  
Insurance Company **Federal Insurance Company**

Endorsement No. **002**  
Premium \$ **Incl.**

Countersigned By \_\_\_\_\_

**CALIFORNIA WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT**

This endorsement applies only to the insurance provided by the policy because California is shown in Item 3.A. of the Information Page.

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule, but this waiver applies only with respect to bodily injury arising out of the operations described in the Schedule, where you are required by a written contract to obtain this waiver from us.

You must maintain payroll records accurately segregating the remuneration of your employees while engaged in the work described in the Schedule.

Schedule

1.  Specific Waiver

Name of person or organization

Blanket Waiver

Any person or organization for whom the Named Insured has agreed by written contract to furnish this waiver.

2. Operations:

3. Premium:

The premium charge for this endorsement shall be 1% percent of the California premium developed on payroll in connection with work performed for the above person(s) or organization(s) arising out of the operations described.

4. Minimum Premium:

\_\_\_\_\_  
Authorized Representative

This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated.  
(The information below is required only when this endorsement is issued subsequent to preparation of the policy.)

Endorsement Effective **05-06-25** Policy No. **71840063**

Endorsement No. **002**

Insured **STRATEGIC GOVERNMENT RESOURCES, INC.**

Premium \$ **Incl.**

Insurance Company **Federal Insurance Company**

Countersigned By \_\_\_\_\_



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

04/30/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Coverica, Inc. 5999 Summerside Suite 200 Dallas TX 75252		<b>CONTACT NAME:</b> Daisy Saldana <b>PHONE (A/C, No, Ext):</b> (972) 490-8800 <b>E-MAIL ADDRESS:</b> daisy.saldana@coverica.com		<b>FAX (A/C, No):</b> (469) 960-2095	
<b>INSURED</b> Strategic Government Resources, INC. 6502 Glen Abbey Lane Abilene TX 79606		<b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Aspen Specialty Insurance Co <b>INSURER B:</b> Progressive Insurance Company <b>INSURER C:</b> R-T Specialty, LLC <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>			<b>NAIC #</b> 24260

**COVERAGES****CERTIFICATE NUMBER:** 25-26 COI**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			CPL-SUE7AAU-P0325	03/22/2025	03/22/2026	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 100,000
							MED EXP (Any one person)	\$ 5,000
							PERSONAL & ADV INJURY	\$ 1,000,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 2,000,000
								\$
B	<input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			992742355	03/22/2025	03/22/2026	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
							Uninsured motorist	\$ 1,000,000
C	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> EXCESS LIAB DED RETENTION \$			AN1342864	03/22/2025	02/22/2026	COMBINED SINGLE LIMIT EACH OCCURRENCE	\$ 2,000,000
							AGGREGATE	\$ 2,000,000
								\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE	OTH-ER
							E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$
A	Professional Liability			CPL-SUE7AAU-P0325	03/22/2025	03/22/2026	General Aggregate	\$3,000,000
							Each Occurrence	\$1,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**

The General Liability, Professional liability, Auto policy includes a blanket automatic additional insured endorsement that provides additional insured status to the certificate holder only when there is a written contract/written agreement between the named insured and the certificate holder that requires such status. The General Liability, Auto policy includes a blanket automatic waiver of subrogation endorsement that provides this feature only when there is a written contract between the named insured and the certificate holder. The General Liability policy includes an endorsement providing that 30 day+ notice of cancellation [or coverage change] will be furnished to the certificate holder. Notice is sent to certificate holders with mailing addresses on file with the agent or the company. The endorsement does not provide for notice of cancellation to the certificate holder if the named insured requests cancellation. The General Liability and Auto policy contains a special endorsement with "Primary and Noncontributory" wording. Umbrella policy follows forms.

**CERTIFICATE HOLDER****CANCELLATION**

Strategic Government Resources, INC. 6502 Glen Abbey Lane Abilene TX 79606	<b>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</b>  <b>AUTHORIZED REPRESENTATIVE</b> 
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AGENCY CUSTOMER ID: \_\_\_\_\_

LOC #: \_\_\_\_\_

# ADDITIONAL REMARKS SCHEDULE

Page \_\_\_\_ of \_\_\_\_

AGENCY Coverica, Inc.		NAMED INSURED Strategic Government Resources, INC.	
POLICY NUMBER			
CARRIER	NAIC CODE	EFFECTIVE DATE:	

## ADDITIONAL REMARKS

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,**

**FORM NUMBER:** 25      **FORM TITLE:** Certificate of Liability Insurance: Notes

Directors & Officers./Crime  
 Policy # 82625020  
 Carrier: Federal Insurance Company  
 Effective Dates 12/16/2024-12/16/2025  
 Limits: \$1,000,000 Aggregate

Cyber Liability, Policy #D95977911  
 Carrier: ACE American Insurance Company  
 Effective Dates: 3/22/2025-3/22/2026  
 Limits: \$1,000,000 Occurrence/\$1,000,000 Aggregate  
 Deductible: \$2,500



AGENCY CUSTOMER ID: \_\_\_\_\_

LOC #: \_\_\_\_\_

# ADDITIONAL REMARKS SCHEDULE

Page \_\_\_\_ of \_\_\_\_

AGENCY Coverica, Inc.		NAMED INSURED Strategic Government Resources, INC.	
POLICY NUMBER		EFFECTIVE DATE:	
CARRIER	NAIC CODE		

## ADDITIONAL REMARKS

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,**

**FORM NUMBER:** 25      **FORM TITLE:** Certificate of Liability Insurance: Remarks

General Liability and Auto policy contains a special endorsement with "Primary and Noncontributory" wording. Umbrella policy follows forms.