

The City of Durant encourages participation from all its citizens. If participation at any public meeting is not possible due to a disability, notification to the City Clerk at least 48 hours prior to the scheduled meeting is encouraged in order to make the necessary accommodations. The City of Durant may waive the 48-hour rule if interpreters for the deaf (signing) or translation services for limited English proficient (LEP) individuals are not the necessary accommodation.

DURANT CITY COUNCIL

6:00 PM

**Roscoe J. Hatfield
Council Chambers,
300 West Evergreen,
Durant, Oklahoma
SPECIAL AGENDA**

August 21, 2023

CALL TO ORDER

INVOCATION/FLAG SALUTE

ROLL CALL

ORDER OF BUSINESS

1. Administration

- a. Consideration of Proposals Received in Response to City Manager Executive Search and Take Possible Action

ADJOURNMENT

CERTIFICATE

This is to certify that in conformity with the Oklahoma Open Meeting Act, public notice of the date, time and place of this meeting was filed with the City Clerk of Durant on the 10th day of August, 2023 and that an agenda of said meeting was posted at the place of such meeting at 9:30 a.m. on the 17th day of August, 2023.



Cynthia J. Price, City of Durant



The City of Durant

Memorandum

Date: 8/21/2023
To: Mayor and City Council
From:
Re: Administration

Council Information / Action Requested

City Staff Information / Action Follow-up, if Council authorizes this action:

ATTACHMENTS:



The City of Durant

Memorandum

Date: 8/21/2023
To: Mayor and City Council
From: Cynthia Price, City Clerk
Re: Consideration of Proposals Received in Response to City Manager Executive Search and Take Possible Action

There were six courtesy notices of the city manager executive search request for proposal mailed out on July 17, 2023. There was one company who contacted the city clerk and independently solicited a request for proposal packet. The request for proposal was advertised on the city website continuously from July 24, 2023 through August 16, 2023. The city clerk received three proposals. The city clerk received one letter declining to submit a proposal.

Council Information / Action Requested

City Staff Information / Action Follow-up, if Council authorizes this action:

ATTACHMENTS:

1. Shawn Metcalf LLC Proposal
2. Oklahoma Municipal Management Services Proposal
3. Baker Tilly US, LLP Proposal

PROPOSAL FOR EXECUTIVE RECRUITMENT SERVICES

City of Durant, Oklahoma

Shawn Metcalf
605 North Shore Drive
Hastings, NE 68901

307-441-0753
ExecutiveRecruitment@ShawnMetcalf.com
www.ShawnMetcalf.com



July 28, 2023
City Council
City of Durant, Oklahoma



Dear Members of the Council,

Thank you for the opportunity to submit this proposal to assist the City of Durant with the recruitment of a new City Manager.

I have the unique ability to provide a personalized and comprehensive recruitment to meet your needs. Here are some aspects that I bring that are unique compared to other recruitment firms.

- I am currently a City Administrator overseeing a \$177 million budget, 400+ full-time employees, and 16 direct reports. Because of this role, I am uniquely positioned to earn the trust of executive candidates, ultimately increasing the chances of retaining them through the recruitment process.
- I currently work for a mayor and 8 council members. I am in tune with the needs and expectations of a City Council and can translate that understanding into finding the best candidate for the City of Durant.
- Altogether, I have 10+ years of executive recruiting experience. Previous notable roles I held include City Manager/CEO, Associate VP of HR, Assistant City Manager/Finance Director.
- I have the highest HR certification obtainable called the SPHR through HRCI. I also have a senior level HR certification called the IPMA-SCP.
- I only accept 1-2 recruitments at a time to ensure your organization receives the time and attention it deserves for a successful recruitment.

I am excited about the prospect of assisting you through this recruitment process.

Thank you for your consideration,

Shawn Metcalf

Table of Contents

1. City of Durant Scope of Work, Experience/Qualifications Requested, Proposal Response Contents.
2. Company Profile
3. Unique Qualifications
4. Executive Recruiter Background
5. Recruitment Methodology
6. Projected Schedule
7. Costs and Service Guarantee
8. Prior Recruitments
9. Appendices:

Appendix A

Sample Contract: Full-Service Recruitment

1. City of Durant Scope of Work, Experience/Qualifications Requested, Proposal Response Contents

“Scope of Work” - RFP

1. I have carefully reviewed items 1-16 in the RFP, “scope of work” and can effectively fulfill all requests.

“Experience/Qualifications Requested” - RFP

1. “Must have demonstrable experience in successfully executing similar executive level searches for an entity of government over the last 5 years.” **Please see the “Prior Recruitments” section of this document.**
2. “Firm must be able to demonstrate knowledge of the economic and political environment in the state of Oklahoma as it pertains to municipal operations. **Having worked for 6 different local governments in 4 different states, I’ve learned that each state has similarities, yet distinct differences. As previously accomplished in other states, I will commit to getting up-to-speed on Oklahoma legislation, particularly in the political and economic environment.**
3. “Firm must be able to demonstrate knowledge of any and all federal, state, and local laws and rules governing this search process, including but not limited to the open Meetings Act and Freedom of Information Act.” **Having the highest HR certification (SPHR) obtainable and having worked in multiple Human Resource Director level positions, I am intimately familiar with regulations and compliance. I will commit to familiarizing myself with Oklahoma’s state and local laws governing this search process to ensure compliance. Additionally, as a current City Administrator, I am very familiar with the Open Meetings Act and Freedom of Information Act.**
4. “Business must be well qualified and in good standing in accordance with all federal, state, and local laws, as well as accreditations governing the executive search services industry.” **Shawn Metcalf LLC is in good standing with all federal, state, and local laws and services industry.**

“Proposal Response Contents”

1. “History of respondent's business.” **Please see section 1, “Company Profile”.**
2. “Experience in recruiting and placing candidates in the state of Oklahoma.” **I have not recruited in Oklahoma, but I have recruited in multiple states, and I am confident in my abilities to successfully recruit in Oklahoma.**
3. “Experience of individuals involved in search.” **Please see section 3. “Executive Recruiter Background”.**
4. “Itemized schedule of costs - full disclosure of all standard and optional costs to be incurred directly for respondent's business services or any subcontracted services the respondent might utilize. Must include a not to exceed total cost. The City is not responsible for any and all costs incurred by the consultant in responding to this RFP.” **Please see section 6, “Costs and Service Guarantee”.**
5. “Explanation of proposed process to establish a consensus set of qualifications and characteristics of the ideal candidate.” **Please see Section 4, “Recruitment Methodology”.**
6. “Explanation of proposed process to recruit the best candidates for the City of Durant.” **Please see Section 4, “Recruitment Methodology”.**
7. “Present a communications strategy for interactions with internal and external stakeholders.” **Please see Section 5, “Projected Schedule”. A minimum weekly update for both internal and external stakeholders.**
8. “Show expected workload for the City Council and City staff, including samples of worksheets for data collections, etc.” **Please see Section 5, “Projected Schedule”.**
9. “Proposed timeline of entire process.” **Please see Section 5, “Projected Schedule”.**

2. Company Profile

Shawn Metcalf (SM) LLC was created in July of 2023 in Hastings, Nebraska.
Although the company is new, Shawn is not new to executive recruiting.

In SM's Employment Agreement with the City of Hastings it states in Section 3.03: Outside Activities: "The employment provided for by this Agreement shall be the Employee's primary employment. Recognizing that certain outside consulting or teaching opportunities provide indirect benefits to the Employer and the community, the Employee may elect to accept limited teaching, consulting, or other business opportunities with the understanding that such arrangements must neither constitute interference with nor a conflict of interest with their responsibilities under this agreement."

Because of this "limited" provision SM will only take on 1-2 executive recruitments at a time to ensure a quality recruitment experience.

SM working hours are Central Time, typically as follows:

- Before 8:00 a.m. Any Day
- 12:00 - 1:00 p.m. Any Day
- After 5:00 p.m. Any Day
- Saturday - All day
- Sunday - All day

Working candidates prefer this schedule because it doesn't interfere with their current working schedules.

SM can text or take phone calls within FLSA guidelines which provides a '15-minute break for every 4 hours worked'.

With reasonable notice SM will request vacation days off to conduct in-person interviews and other requested services.

3. Unique Qualifications

SM's Local Government Experience

SM is currently the City Administrator of Hastings, Nebraska. He oversees \$177 million budget, 400+ full-time employees, and 16 direct reports. **Shawn was the unanimous selection of a 12-member citizen/employee hiring committee AND the unanimous selection in a 9-0 vote of members of the City Council.**

Having passed such a rigorous executive recruitment experience with flying colors, SM will expect nothing less than the best for the City of Durant.

Altogether he has 10+ years of executive recruiting experience in local government and quasi-government entities.

SM holds the highest HR certification obtainable called the SPHR through HRCI. He has another senior level HR certification called the IPMA-SCP. He has a master's degree in public administration and a bachelor's degree in Recreation Management both from the Marriott School of Management.

Advantages of using a current City Administrator as your executive recruiter

- With another agency you might be assigned a recruiter that has never been a City Manager, City Administrator, Finance Director, and HR Director. SM has held all these roles.
- SM will quickly garner the respect and trust of both executive candidates and local government officials because of his current role, education, and experience. Ultimately, this will increase the likelihood of a successful recruitment.
- SM will ask the right questions and will see red flags that might not be apparent to other recruiting firms.
- **SM currently works closely with elected officials as a City Administrator and understands their needs in ways other recruiting agencies may not understand.**

Advantages of using SM who has worked for 7 government entities in 4 different states.

- City of Eagle Mountain (UT)
- City of Pleasant Grove (UT)
- City of San Antonio (TX)
- City of Roosevelt (UT)
- City of Rawlins (WY)
- Quasi-Government UBTech (UT)
- City of Hastings (NE)

The populations of these cities ranged from as low as 7,000 to as high as 1,400,000.

Having worked for a diverse set of governmental entities, SM will understand your needs whether you are a small, mid, or large-sized public entity.

Additionally, SM has experienced and overcome a tremendous number of challenges, which gives him unique insights into the competency level of candidates.

Commitment to Equal Opportunity

SM believes in equal opportunity for all. Having experienced a disability himself growing up, he will be cognizant to provide a fair experience for all candidates, especially for protected classes.

As a certified SPHR, SM understands employment law and the importance of providing an equitable experience for candidates of all protected and non-protected classes.

Communication & Listening

SM has been praised by multiple city councils, through performance evaluations, that his communication and listening skills are his greatest strengths. These skills will serve your city well in the recruitment processes.

4. Executive Recruiter Background



MPA, SPHR, IPMA-SCP

Shawn Metcalf was born and raised in Orem, Utah. Shawn has always had a desire to serve others, which is what lead him into local government.

Shawn has a bachelor's degree in Recreation Management. While in his Master of Public Administration program, Shawn had the opportunity to work in 2 different cities as a Management Intern. During that time, he worked for a City Manager, Economic Development Director, Community Development Director, and Special Events Manager. These experiences solidified his desire to continue in the career of public service.

Shawn's first "real job" was with the City of San Antonio, Texas. As a Management Analyst, he oversaw the compliance of **51 grant funded projects**. Shortly into his position, his supervisor invited him to transfer to the budget

department with him and become a Budget and Management Analyst. Seeing this as another learning experience, he accepted the offer.

After one year in the budget department Shawn became a Senior Budget and Management Analyst. In this role, he reconciled the City's General Fund, which was approximately **1 billion dollars** at the time. He also oversaw large budgets amounting to **\$280 million dollars**. He reported directly to the Budget Director.

Shawn wasn't looking to leave San Antonio, but he nonchalantly put in one application and was selected as Assistant City Administrator/Finance Director for the City of Roosevelt, Utah with a **10 million budget**. The learning curve was steep; however, he had the best mentor who was the previous finance director that had moved into the City Manager role. Shawn's new role wore many hats, including being the HR Director.

Shawn was then head hunted by the local quasi-governmental technical college where he started as HR Director and was subsequently promoted by the College President to serve as the Associate Vice President of Human Resources (AVPHR).

After 5 ½ years as AVPHR, Shawn made the plunge into his first role as City Manager/CEO for the small sized (7,000) City of Rawlins, Wyoming. His budget oversight grew to **\$33 million** compared to the 10 million budget he oversaw in Roosevelt, UT.

Finally, a unique opportunity came along to become the City Administrator of Hastings, Nebraska, population 25,000. **Shawn's responsibility grew to overseeing \$177 million dollars, 400+ full-time employees, and 16 direct reports.**

Through various Human Resources positions, Shawn learned that he loved recruiting. In July, 2023 he started a side gig in executive recruiting, entitled Shawn Metcalf LLC, Public Sector Executive Recruitment. Shawn's mission is to assist governmental entities in finding the best candidates for executive level positions.

Shawn is married and has 3 daughters, ages 5, 7, and 10. In his free time, he enjoys family time, reading, fishing, and executive recruiting.

5. Recruitment Methodology

Recruitment Strategy

- Define candidate profile through one-on-one interviews with Search Committee members.
- Identify key stakeholders that can help with the recruitment process.
- Review job description.
- Identify testing/assessment needs.
- Develop a recruitment plan and timeline.

Advertising, Outreach, and Sourcing

- Create a customized position recruitment bulletin and brochure.
- Identify key advertising sources.
- Initiate nationwide marketing campaign.
- Accept applications and communicate with applicant prospects. Semi-finalists selected.

Review, Interview, and Selection

- Initial screening and review.
- Targeted phone screening interviews.
- Recorded online interviews with SM.
- Provide list of qualified candidates and all briefing materials for Search Committee to review.
- Search Committee selects finalists.
- Develop interview questions, process, and train interview panel.
- Face-to-face interviews, deliberation, reference checks, and negotiation.

6. Projected Schedule

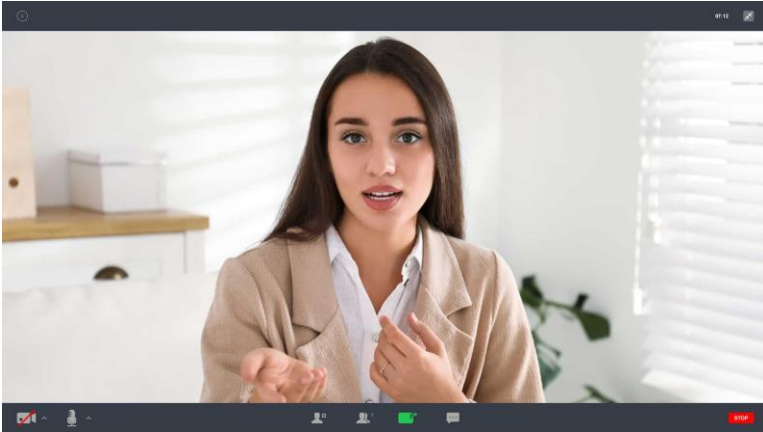
Task	Weeks
- Define candidate profile through one-on-one interviews with Search Committee members. - Identify key stakeholders to assist with the recruitment process. - Review job description. - Identify testing/assessment needs. Deliverable: Develop a recruitment plan and timeline.	Week 1
Deliverable: Create a customized position recruitment bulletin and brochure. - Identify key advertising sources. - Initiate nationwide marketing campaign.	Weeks 2-3
Accept applications and communicate with applicant prospects. Semi-finalists selected.	Weeks 4-7
- Initial screening and review. - Targeted phone screening interviews. - Recorded online interviews with SM. Deliverable: Provide list of candidates and briefing materials for Search Committee to review.	Weeks 8-10
Search Committee selects finalists.	Week 11
Deliverable: Develop interview questions, process, and train interview panel. - Face-to-face interviews, deliberation, reference checks, and negotiation.	Weeks 12-14

Expected Workload for City Council and Staff

	City Council	Staff
Week 1	2-3 hours	4 hours
Weeks 2-3	N/A	2 hours
Weeks 4-7	1 hour	1 hour
Weeks 8-10	2-3 hours	2-3 hours
Week 11	2-3 hours	2-3 hours
Weeks 12-14	6 hours	6 hours
Total	13 - 16 hours	17 - 19 hours

Worksheets Examples

Recorded Video Interviews:



One of several recruiting/tracking platforms:

indeed for employers | Dashboard | Find resumes | Analytics | Need help? | Champion Solutions | [Notifications] [Messages] [Profile]

Jobs | **Candidates** | Messages | Search candidates [_____]

Customer Service Representative ▾ | **Applicants (17)** | Matched job seekers

17 Active | 12 Awaiting review | 2 Reviewed | 2 Contacted | 0 Hired | 22 Rejected | Import candidates [_____]

Yes (2) | Maybe (2) | Expiring (2) | Assessment: Any ▾ | Screener questions Any ▾ | Location: Any ▾ | Sort: Apply date (newest) ▾

☐ Name	Status	Matches to job post ▾	Recent experience	☐ Interested?
☐ Harper Lee	Awaiting Review Applied Apr 23	✓ Overall assessment: Highly proficient ✓ Customer service: 6 yrs ✓ Background check ✓ Skill: Excel ✓ Skill: Salesforce ✓ Skill: Zendesk	Customer Service Representative Grand Company • Jul 2015-Present	☒ ? x ⋮
☐ Susan Kare	Reviewed Applied Mar 3	✓ Overall assessment: Expert ✗ Customer service: 4 yrs ✓ Background check ✓ Skill: Excel ✓ Skill: SQL ✓ Skill: Call center	Customer Success Manager Oracle • Jul 2015-Present	☒ ? x ⋮
Latest note: Looks like Susan has great coaching experience. Would be good to see if she's a fit for training.				
☐ Peter Maunsell	Awaiting Review New message	✓ Overall assessment: Completed ✗ Customer service: 2 yrs ✗ Background check ✓ Skill: Excel ✓ Skill: Salesforce ✓ Skill: Zendesk	CS Agent Grand Company • Jul 2015-Present	☒ ? x ⋮

7. Costs and Service Guarantee

Service Costs	
Not-to-Exceed Price *Ad placement costs are not included in the Not-to-Exceed Price. These costs are estimated to be between \$1,000 and \$2,000 and will be added to the total cost of services.	\$24,000
Not-to-Exceed Price includes the services below:	
Professional Services Fee	\$19,000
Position Recruitment Brochure • Production of a professional position profile brochure. • Custom-designed graphics for social media and email marketing.	\$1,500
Semifinalist Recorded Online Interviews • Price per interview. For up to 12 finalists.	\$225
Comprehensive Media Reports • Price per report. For up to 5 finalists	\$500
Comprehensive Reference Checks • Price per reference check. For up to 5 finalists.	\$225
Onsite Recruiter Visits • Up to two (2) multi-day onsite visits by one recruiter to the Organization. Meals and mileage billed back at IRS rates. All other travel-related expenses are billed back at actual cost, with no markup for overhead.	

Supplemental Service Costs (Not included in the Not-to-Exceed Price)	
Additional Online Interviews Price per candidate over and above the twelve (12) included in the not-to-exceed price above	\$225
Additional Comprehensive Media Briefing Reports Price per report over and above the five (5) included in the not-to-exceed price above	\$500
Additional Comprehensive Reference Checks Price per report over and above the five (5) included in the not-to-exceed price above	\$225
Additional Onsite Visits	

Over and above the two (2) recruiter visits included in the not-to-exceed price. Travel and onsite time will be billed at a professional fee (per recruiter) of \$1,000 per half-day and \$1,500 per full day. Meals and mileage billed back at IRS rates. All other travel related expenses are billed back at actual costs, with no markup for overhead.

Candidate Reimbursement

Candidates are reimbursed directly by the Organization for travel expenses.

Supplemental Services Not Mentioned

If the Organization desires any supplemental services not mentioned in this section, an estimate of the cost and hours to be committed will be provided at that time. Supplemental services will be billed out at \$250 per hour. No work will be done without approval.

Billing

The professional service fee for the recruitment is billed in **three (3) equal installments** during the recruitment.

- Initial Installment - billed after the position profile brochure has been created.
- Second Installment - billed after semifinalists are selected.
- Final Installment - billed at the conclusion of the recruitment.

Expenses and Supplemental Services - billed with each of the three installments, as appropriate.

Service Guarantee

SM guarantees that you will be satisfied with the results of the full-service recruitment process, or SM will repeat the entire process one additional time and charge only for expenses. Additionally, if you select a candidate (that SM has fully vetted) who resigns or is released within 18 months of their hire date, SM will repeat the process one additional time and charge only for expenses. If the organization circumvents SM's recruitment process and selects a candidate who did not participate in the full recruitment process, the service guarantee is null and void. SM also guarantees that SM will not directly solicit a candidate brought to you for another job.

8. Prior Recruitments

Local Government (Wyoming)

- **Fire Chief**
 - Blain Schumacher
- **Police Chief**
 - Michael Ward
- **Public Works Director**
 - Cody Dill
- **Human Resources Director**
 - Stefanie Paulson
- **Finance Director**
 - Tom Sarvey
- **Community Development Director**
 - Lou Lascano
- **Parks and Recreation Director**
 - Jason Sehon
- **City Attorney**
 - Gwendolyn Wade
- **Economic Development Director**
 - Nate Davison

Quasi-Government (Utah)

- **Vice President of Marketing and Communications**
 - Stephanie Taylor
- **Vice President of Student Affairs**
 - Dean Wilson
- **Director of Curriculum and Instructional Quality**
 - Mark Dockins
- **Chief Development Officer**
 - Heather Lowry
- **Director of Business and Trades**
 - Tim Miller
- **Registrar**
 - Sasha Bolt
- **Marketing Designer**
 - Kassie Timothy
- **Carpentry Instructor**

- Kolton Hunter
- **Practical Nursing Instructor**
 - Jeanie Luck
- **Pharmacy Technician Instructor**
 - Eric Christensen
- **Health Professions Instructor**
 - Taryn Howcroft
- **Surgical Technician Instructor**
 - Mindee Baum
- **Simulation Coordinator**
 - Adam Rockwood
- **Medical Assistant Instructor**
 - Leigh Lloyd
- **Welding Instructor**
 - Rick Prather
- **Automotive Instructor**
 - Greg Keel
- **Cabinetry Instructor**
 - Daniel Tucker
- **Construction Technology Instructor**
 - Eric Christensen
- **Diesel Instructor**
 - Brant Mckeachnie
- **Business Program Instructor**
 - Lyndsay Brown
- **Culinary Arts Instructor**
 - Travis Taggart
- **Environmental Geo Science Instructor**
 - Stephen Ward
- **CDL Instructor**
 - Tim Trujillo
- **Information Technology Instructor**
 - Heber Hamilton

9. Appendices:

Appendix A

Sample Contract: Full-Service Recruitment

Agreement for Executive Recruitment Services for City Administrator between Shawn Metcalf LLC (“SMLLC”)

and

City of Durant, Oklahoma (“Organization”)

Scope of Services:

SM shall provide all services for recruitment as described in the formal proposal submitted and described in abbreviated form as follows:

- Define candidate profile through one-on-one interviews with Search Committee members.
- Identify key stakeholders that can help with the recruitment process.
- Review job description.
- Identify testing/assessment needs.
- Develop a recruitment plan and timeline.
- Create a customized position recruitment bulletin and brochure.
- Identify key advertising sources.
- Initiate nationwide marketing campaign.
- Accept applications and communicate with applicant prospects.
- Initial screening and review.
- Targeted phone screening interviews.
- Recorded online interviews with SM.
- Provide list of qualified candidates and briefing materials for Search Committee to review.
- Search Committee selects finalists.
- Develop interview questions, process, and train interview panel.
- Face-to-face interviews, deliberation, reference checks, and negotiation.

The Organization agrees:

- To provide photos/graphics and information necessary to develop position brochure.
- To respond to drafts of documents and reports in a timely manner; failure to do so may extend timelines and can negatively impact the outcome of the process.
- To refer all prospective applicants to SM and shall not accept applications independently during the recruitment process.
- To provide reproduction of hard copy brochures, if desired
- To provide any direct mailings desired by the Organization.
- To provide legal opinions to SM regarding when and if any information must be released in accordance with Public Information requests.
- To directly reimburse finalists for travel-related expenses to interview
- That Organization is ultimately responsible for candidate selections and that Organization will not 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.
- To comply with the Fair Credit Reporting Act (FCRA) with regard to any pre- or post-adverse action notices and requirements if the Organization decides not to hire a candidate as a result of their credit history report.

SM shall be compensated by the Organization as detailed below:

Not-to-Exceed Price = \$24,000

* Ad placement costs are not included in the Not-to-Exceed Price. These costs are estimated to be between \$1,000 and \$2,000 and will be added to the total cost of services.

Not-to-Exceed price includes:

- Professional Service Fee - \$19,000
- Expenses (will appear on invoices until not-to-exceed price is reached):
 - Position Brochure & Marketing - \$1,500 ▪ Production of a professional position profile brochure
- Semifinalist Recorded Online interviews for up to twelve (12) semifinalists - \$225 each.
- Comprehensive Media Reports for up to five (5) finalists - \$500 each
- Comprehensive Reference Checks with individual reports for up to five (5) finalists - \$225 each

Up to two (2) multi-day onsite visits by recruiter SM to the Organization. Meals and mileage billed back at IRS rates. All other travel-related expenses are billed back at actual cost, with no markup for overhead.

Additional Onsite Visits

Over and above the two (2) recruiter visits included in the not-to-exceed price. Travel and onsite time will be billed at a professional fee (per recruiter) of \$1,000 per half-day and \$1,500 per full day. Meals and mileage billed back at IRS rates. All other travel related expenses are billed back at actual costs, with no markup for overhead.

Reimbursable Expenses

- Ad placements, as approved by the Organization, will be billed back at actual cost with no markup for overhead.

Supplemental Services (not included in the not-to-exceed price above):

- Additional online interviews (over and above the twelve (12) included in the not-to-exceed price above) are offered for \$225 per candidate.
- Additional comprehensive media reports (over and above the five (5) included in the not-to exceed price above) are offered for \$500 per candidate.
- Additional reference checks (over and above the five (5) included in the not-to-exceed price above) are offered for \$225 per candidate.
- Semifinalist and finalist briefing materials will be provided to the search committee via an electronic link.
- Additional onsite visits Over and above the two (2) recruiter visits included in the not-to-exceed price. Travel and onsite time will be billed at a professional fee (per recruiter) of \$1,000 per half-day and \$1,500 per full day. Meals and mileage billed back at IRS rates. All other travel related expenses are billed back at actual costs, with no markup for overhead.
- Candidates will be reimbursed directly by the Organization for travel expenses.
- If the Organization desires any supplemental services not mentioned in this section, an estimate of the cost and hours to be committed will be provided at that time, and no work shall be done without approval. Supplemental services will be billed out at \$250 per hour.

Billing:

The professional service fee for the recruitment is billed in three equal installments during the course of the recruitment. The initial installment is billed after the position profile brochure has been created. The second installment is billed after semifinalists are selected. The final installment is billed at the conclusion of the recruitment. Expenses and supplemental services will be billed with each of the three installments, as appropriate.

Organization Contact for Invoicing

Name: _____

Position: _____

Email: _____

Phone: _____

Service Guarantee:

SM guarantees that you will be satisfied with the results of the full-service recruitment process, or SM will repeat the entire process one additional time and charge only for expenses. Additionally, if you select a candidate (that SM has fully vetted) who resigns or is released within 18 months of their hire date, SM will repeat the process one additional time and charge only for expenses. If the organization circumvents SM's recruitment process and selects a candidate who did not participate in the full recruitment process, the service guarantee is null and void. SM also guarantee that we will not directly solicit a candidate we bring to you for another job.

Expenses in the event of a repeat search shall include:

- Position Brochure Edits, Custom Graphics, and SM Marketing - \$750
- Ad placements, as approved by the organization, will be billed back at actual cost with no markup for overhead.
- Online interviews - \$225 per candidate.
- Comprehensive media reports - \$500 per candidate.
- Reference checks - \$225 per candidate.
- Recruiter travel. Travel and onsite time will be billed at a professional fee of \$1,000 per half-day and \$1,500 per full day. Meals and mileage are billed back at IRS rates. All other travel-related expenses are billed back at actual cost, with no markup for overhead.
- Candidates are reimbursed directly by the organization for travel expenses.

- If the Organization desires any supplemental services not mentioned in this section, an estimate of the cost and hours to be committed will be provided at that time, and no work shall be done without approval.

Terms and Conditions:

- The Organization reserves the right to terminate this agreement at any time upon giving SM seven days advanced written notice to SM, Attn: Shawn Metcalf, 605 North Shore Drive, Hastings, NE 68901 or by email to ExecutiveRecruitment@ShawnMetcalf.com. In such an event, SM will be compensated for all work satisfactorily completed up to and through the date of termination.
- The Organization acknowledges that the nature of executive recruitment is such that SM engages in discussions with prospects throughout the process who may or may not ultimately become a candidate, and that SM is utilizing its proprietary network of relationships to identify and engage prospective candidates, and that premature release of such proprietary information, including names of prospective candidates who SM may be having conversations with as part of the recruitment process, may be damaging to the prospects and SM. Accordingly, the Organization acknowledges and, to the extent provided by law, agrees that all information related to this search is proprietary, and remains the property of and under the exclusive control of SM, regardless of whether such information has been shared with the Organization or not, including all decisions regarding release of information, until such time that a finalist is named. At the time finalists are determined, all information related to the finalists shall become the property of the Organization and all decisions regarding public disclosure shall be determined by the Organization, except that questionnaires and any information produced by SM is proprietary and shall not become the property of the Organization or subject to disclosure. If the Organization receives an open records request, the Organization shall notify and share the request with SM in writing as soon as possible but within no more than three (3) business days of receipt. The Organization shall provide sufficient time for SM to notify and provide advance notice to the impacted individuals prior to the Organization releasing the required information with protected information redacted.

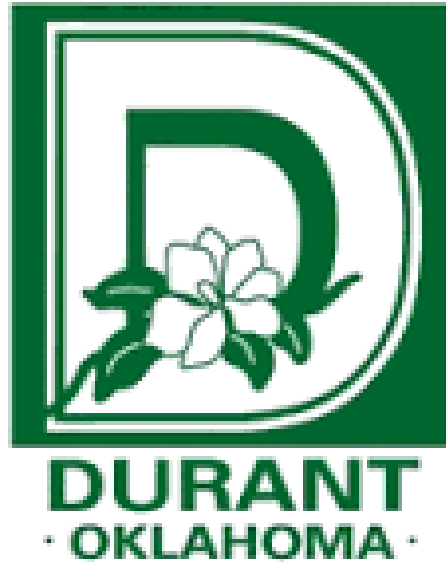
Approved and agreed to, this the _____ day of _____, 2023 by and between

Shawn Metcalf, CEO
Shawn Metcalf LLC

City of Durant, Oklahoma

Printed Name: _____

Title: _____



Proposal for Executive Search Services

City Manager, City of Durant

Steve Whitlock, Executive Director
executivedirector@okmms.org
7633 East 63rd Place
Suite 507
Tulsa, OK 74133
(918) 743-8018
www.okmms.org

TABLE OF CONTENTS

1. OMMS Statement of Qualifications
 - a. History
 - b. What We Do
 - c. Why We Are Different
2. Key Personnel
3. Methodology & Timeline
4. Fee Proposal
5. References
6. Sample Resolutions
7. Contract for Professional Services

OMMS STATEMENT OF QUALIFICATIONS

History of OMMS

During the 2017 City Management Association of Oklahoma (CMAO) Summer Conference, the membership approved a motion: (1) approving the formation of a Circuit Rider City Manager Program committee, (2) hiring a consultant (i.e., Steve Whitlock) and (3) requesting that a proposed Circuit Rider City Manager Program be brought back to the membership in January 2018 for review and consideration.

As the selected consultant, I requested that any volunteer who was interested in serving on the above-mentioned committee, to please contact me in order to be included on the Circuit Rider City Manager Program committee; my desire was to have a diverse committee that had representation from various population bases, as well as various geographical areas throughout Oklahoma.

Once appointed, committee members included managers-in-transition to seasoned managers who served populations of less than 2,000 to more than 81,000. As can be determined, this committee's diversity is a reflection of how important this program is and the desire to offer a true, professional management option to Oklahoma communities that may be in need of such a service.

The committee's first order of business was to schedule the inaugural meeting which was held in Tulsa, Oklahoma during the Oklahoma Municipal League (OML) conference. As a result of that meeting, several draft documents were developed on the proposed CMAO Circuit Rider City Manager Program. As was stated to the committee on multiple occasions, there was "no pride in authorship" on these documents, so I humbly welcomed comments, suggestions, criticisms and any other comments that were deemed necessary in order to make this program a reality.

Once time had passed for the committee to submit comments, program documents were then updated and submitted to the CMAO Board of Directors for review and consideration. Based upon the direction from the Board, it was recommended that the program be changed to Municipal Management Services (MMS) then later changed to the current name of Oklahoma Municipal Management Services (OMMS) in order to reflect our commitment to Oklahoma communities. It should be noted that the OMMS program was unanimously approved by the CMAO membership, and a new organization was created in order to assist cities and towns in Oklahoma with any local government services they desire.

STATEMENT OF QUALIFICATIONS

What We Do

The Oklahoma Municipal Management Services (OMMS) organization was formally created, under State law pursuant to 74 O.S. § 1001, et seq, as an “Oklahoma Interlocal Cooperative” organization which allows Oklahoma cities and towns to work together by offering management assistance and other services to member communities. Initially, the cities of Harrah and Mustang entered into agreements to make the most efficient use of their powers by enabling them to cooperate with each other, by contract, for the performance of services or undertakings which the public agencies are authorized by law to perform. With approximately 135 member communities, OMMS continues to grow and expand its membership base as other cities and towns are joining forces in order to cooperate in municipal management services that assist with the operations of municipalities, including but not limited to management assistance, studies, staff recruitment, work sessions and analysis of operations.

OMMS focuses on several primary objectives, including:

- 1. MANAGEMENT SERVICES:** whether on an interim, part-time or project basis, with a focus on assisting cities and towns with municipal management recruitment in order to establish long-term employment stability which not only benefits the manager but also the community as well.
- 2. REGIONAL COORDINATOR:** assist cities and towns in developing partnerships with each other to complete specific projects.
- 3. MUNICIPAL RESEARCH & ADVOCACY:** provide studies and information that assist cities and towns in evaluating their operations, including database development, public relations and other important municipal services.
- 4. ECONOMIC DEVELOPMENT:** assist members with attracting and retaining retail and industrial businesses, which expands the economic base of all Oklahoma communities.

STATEMENT OF QUALIFICATIONS

Why We Are Different

OMMS is different from other “national” organizations because we are 100% composed of numerous long-term, professional, Oklahoma municipal employees who specialize in every aspect of municipal government, from human resources, legal services and municipal management, to everything else in between. If it relates to municipal government, then OMMS can assist because it is what we do. This does not mean that OMMS only has an “Oklahoma” focus or reach since, it should be noted, that the Executive Director was the first City Manager in Oklahoma to obtain the *credentialed manager* designation from an “international” organization (i.e., the International City/County Management Association). What it does mean is that OMMS “knows” Oklahoma...we know Oklahoma municipalities’ success stories, challenges, citizen desires, funding restrictions, laws, staffing needs, service demands, elected officials’ expectations and how to effectively manage local communities, since “everything is local in Oklahoma municipalities.” Thus, should you not select a “local” organization that knows your local needs and wants while still having a “national” reach?

OMMS is qualified to provide your organization with the services you desire. Our staff has many years of municipal experience, as well as the contacts necessary to get things done. We are a full-service, successful organization that was developed to meet the needs of Oklahoma municipalities. Key OMMS staff members have attended more than 1,000 City Council meetings, provided municipal training to countless organizations and assisted communities in the recruitment of interim staff to the placement of full-time personnel throughout Oklahoma.

KEY PERSONNEL

Steve Whitlock, OMMS Executive Director

Steve Whitlock will be the lead contact for the City of Durant. Mr. Whitlock served in various positions in Drumright, Mustang, Owasso, Coweta, Collinsville and Eufaula. He is a 1990 graduate of Oklahoma State University with a Bachelor of Arts degree in Political Science and a 1992 graduate of the University of Oklahoma with a Master's degree in Public Administration. He was the first City Manager in Oklahoma to obtain the "credentialed manager" designation from the International City/County Management Association and was also previously selected as the Oklahoma City Manager of the Year by the City Management Association of Oklahoma. Mr. Whitlock is a Past President of the City Management Association of Oklahoma, a member of the International City/County Management Association, the American Society for Public Administration, as well as numerous other municipal and civic organizations.

Mike Vanderburg, General Counsel

Mike has nearly 40 years of service as a municipal attorney and served in multiple municipalities such as Broken Arrow, Morris, Okmulgee, and most recently, Ponca City. He is a founding member of the Oklahoma Association of Municipal Attorneys, where he also served on the Board of Directors. During his extensive career, Mr. Vanderburg has been involved in various municipal associations by either being a member or as a reliable source for presentations.

Brittany Long, Director of Administration

Brittany has over 10 years of municipal experience. She started at the City of Coweta as a Customer Service Representative/Utility Billing Clerk before quickly rising to the position of City Clerk/Treasurer. Most recently she served as the City Clerk for the City of Jenks. Ms. Long uses her Master degree in Business Administration by coordinating all administrative duties for OMMS and each association managed by the organization.

Amanda Miller, Administrative Assistant

Amanda has nearly five years of municipal experience and almost ten years of organizing and coordinating for public officials. Amanda has a background in writing policies, public relations, and general organization. Ms. Miller has an Associate's degree in Political Science.

METHODOLOGY & TIMELINE

1. Meet with staff and the City Council to identify key characteristics and qualities that will ensure a long-term fit for the next city manager of Durant. All timelines will be established by the City Council to ensure that necessary deadlines are met within the time limits desired by the City of Durant.
2. Create a City Council-approved process for hiring, by resolution (see attached). Includes qualifications, timeline, public involvement and public disclosures, in accordance with the City Management Association of Oklahoma approved resolution (see attached). An agenda item to review the sample resolution in an open meeting is necessary to ensure complete compliance with the Open Meeting Act. This creates a more open process that sets expectations for the public and has proven success in other Oklahoma municipalities. The proposed resolution clearly establishes that the City Council is in control of the selection process (with assistance) and will make the ultimate selection. It is important to have a goal of unanimous approval of the final hire, as stated in the resolution.
3. Develop and distribute recruitment and advertising materials including a community profile, position expectations, scope of salary and benefits and City Council-approved qualifications. Specifically includes a recruitment brochure and online advertising (social media, website, online newsletter), including but not limited to the City Management Association of Oklahoma (CMAO), the Oklahoma Municipal League (OML), the Texas Municipal League (TML) and the International City/County Management Association (ICMA).
4. OMMS will take the time necessary to ensure recruitment of the right candidate with deadlines that are satisfactory to the Council. As applications are received, OMMS will send eligible applicant a questionnaire, with municipal management scenarios, for completion by the applicant.
5. Initial Screening and Review: The initial meetings with the City Council will result in the approval of a screening and review process. OMMS will receive all applications and resumes, and we will utilize our BaseCamp communication portal, which will allow the Durant City Council with “real time” access to the process (once all City Council email addresses have been received by OMMS).
6. Background Checks: OMMS will execute background checks on the top candidates identified during the evaluation of semifinalist phase.

7. Evaluation of Finalist Candidates.
8. Interview Process: OMMS will prepare sample questions and an evaluation form to be used during the interview process. The goal of OMMS is to make the City Council's role as effective and efficient as possible while ensuring the best candidate is selected.
9. Negotiations and Hiring Process: OMMS will have sample proposed contracts for the City of Durant's Attorney to evaluate for possible use.

FEE PROPOSAL

Professional Services Fee: \$16,900

1/3rd due at notice to proceed, 1/3rd due at the evaluation of semifinalist phase and the remainder due at completion of the interview process.

Expenses Not to Exceed: \$4,500

Expenses include professional recruitment brochure, advertising costs and candidate background checks on selected applicants.

NOTE: Travel costs for the selected candidates are not included in this proposal and, as such, would be the responsibility of the City of Durant.

REFERENCES

City of Durant, Oklahoma

Interim City Manager, Rick Rumsey
300 West Evergreen
Durant, OK 74702
(580) 931-6600

Recruited and placed a City Manager and Interim City Manager in Durant, Oklahoma.

City of Kingfisher, Oklahoma

City Manager, Jim Thomas
301 North Main
Kingfisher, OK 73750
(405) 375-3705

Recruited and placed a City Manager in Kingfisher, Oklahoma.

City of McAlester, Oklahoma

City Manager, Dave Andren
28 East Washington
McAlester, OK 74502
(918) 423-9300

Recruited and placed a City Manager in McAlester, Oklahoma.

Municipal Electric Systems of Oklahoma (MESO)

General Manager, Cheryl Adams
308 NE 27th Street
Oklahoma City, OK 73105
(405) 528-7564

Recruited and placed a General Manager at MESO.

City of Norman, Oklahoma

City Clerk, Brenda Hall
201 West Gray
Norman, OK 73070
(405) 366-5406

Recruited and placed an Interim City Manager in Norman, Oklahoma.

City of Sapulpa, Oklahoma

City Manager, Joan Riley
425 East Dewey
Sapulpa, OK 74067
(918) 224-3040

Recruited and placed a Police Chief in Sapulpa, Oklahoma.

SAMPLE RESOLUTIONS

DURANT, OKLAHOMA

RESOLUTION NO. _____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF DURANT, OKLAHOMA, CONCERNING THE HIRING PROCESS FOR A CITY MANAGER FOR THE CITY OF DURANT, AND ESTABLISHING POLICIES AND PROCEDURES FOR SAID HIRING PROCESS

WHEREAS, the City Council of the City of Durant, Oklahoma, pursuant to state law, is responsible for the selection and appointment of the City Manager of the City; and,

WHEREAS, with a current vacancy in the position, the City Council is required to select and appoint a new City Manager of the City; and,

WHEREAS, the City Council desires to create a process that will encourage the most qualified applicants possible to consider employment with the City, and desires to complete the hiring within a timely manner; and,

WHEREAS, approval of a written process will benefit the City Council, possible applicants, and the public by making the selection process as clear as possible; and,

WHEREAS, approval of this resolution is in the best interests of the residents of the City of Durant.

NOW, THEREFORE BE IT RESOLVED by the City Council of the City of Durant, Oklahoma, as follows:

The City Council approves the following procedures in the hiring of a new City Manager:

Oklahoma Municipal Management Services (OMMS) is directed to advertise the position with OMMS, the City Management Association of Oklahoma (CMAO), the Oklahoma Municipal League (OML), the Texas Municipal League (TML) and the International City/County Management Association (ICMA), and any other appropriate online city management websites deemed appropriate by OMMS.

The initial review of applications will commence on _____, 2023.

The advertisement attached as Exhibit 1 is approved for publication.

**Oklahoma Municipal
Management Services**

The City Manager Job Description attached as Exhibit 2 is approved.

All applications shall be submitted to the attention of OMMS, 7633 East 63rd Place, Suite 507, Tulsa, Oklahoma, 74133, or by email at recruiter@okmms.org, and shall be kept strictly confidential.

Council Members will work individually and collectively with OMMS to review all applications received and will determine an appropriate number of qualified candidates to interview.

The City Council establishes as a goal the objective of reaching unanimous approval on the candidate who is selected.

Each Council Member is encouraged to seek input from members of the public about the characteristics and qualifications that are important to the residents for the selection process, to share their goals and expectations with prospective candidates and citizens to help establish shared goals for the Council and the community, and to individually consider those goals, characteristics and qualifications during the hiring process.

The City Council will abide by the recommendations of the City Management Association of Oklahoma (CMAO) regarding the integrity of the selection process and respect for applicants and will not publicly disclose the identity of applicants (unless disclosure is approved in writing by the affected applicants), as set forth by Exhibit 3.

The City Council establishes a goal that the hiring process be completed by _____, 2023.

Dated and approved this _____ day of _____, 2023.

CITY OF DURANT, OKLAHOMA

Martin Tucker, Mayor

ATTEST:

APPROVED AS TO FORM:

Cynthia Price, City Clerk

Thomas Marcum, City Attorney

**Oklahoma Municipal
Management Services**

EXHIBIT 1

**City Manager Advertisement
City of Durant, Oklahoma
(TO BE DETERMINED)**

EXHIBIT 2

**City of Durant, Oklahoma
City Manager
Job Description
(TO BE DETERMINED)**

EXHIBIT 3



RESOLUTION NO. 2008-01

**A RESOLUTION OF THE CITY MANAGERS ASSOCIATION OF OKLAHOMA
CONCERNING THE PROPER HIRING PROCESSES FOR CITY MANAGERS IN THE
STATE OF OKLAHOMA**

WHEREAS, a number of entities have proposed guidelines and procedures concerning the hiring process, including the role of the public during the interview and selection of City Managers and Town Administrators in the State of Oklahoma;

WHEREAS, the City Managers Association of Oklahoma represents the interest of City Managers, Town Administrators, and other management professionals for municipalities within the State;

WHEREAS, the role of the public in the selection and interview process is an important issue for the municipalities and professionals involved in the selection process;

WHEREAS, the approval of guidelines concerning the selection process will benefit the public, municipalities, applicants and professionals involved in the selection process;

NOW, THEREFORE BE IT RESOLVED by the City Managers Association of the State of Oklahoma, as follows:

The requirement that applicants for vacant management positions be publicly disclosed is not required by law, and said disclosure will discourage good and qualified candidates from applying for vacant positions.

The interest of the public is protected in the selection process by the involvement of an elected body that represents the interest of the municipality and the public in the selection process.

The City Managers Association of Oklahoma recommends that all municipalities in Oklahoma respect the interest of applicants for management positions, create processes that encourage the greatest number of qualified candidates, and acknowledge the significance of confidentiality in the application and interview process for management positions.

All City Manager applicants are encouraged to submit this resolution with their application to inform municipalities of the importance of this issue for the profession in Oklahoma.

Approved by the membership of the City Managers Association of Oklahoma

Steve Whitlock, President

**Oklahoma Municipal
Management Services**

CONTRACT FOR PROFESSIONAL SERVICES

CONTRACT FOR PROFESSIONAL SERVICES

THIS CONTRACT FOR PROFESSIONAL SERVICES is made and entered on this ____ of _____, 2023, by and between the City of Durant, Oklahoma, a municipal corporation, located at 300 West Evergreen Street, Durant, Oklahoma, 74702-0578 (Client), and Oklahoma Municipal Management Services, a 74 O.S. § 1001, et seq, “Oklahoma Interlocal Cooperative” organization, located at 7633 East 63rd Place, Suite 507, Tulsa, Oklahoma, 74133 (OMMS).

WHEREAS, the Client wishes to retain the professional Executive Search Services of OMMS on the terms and conditions set forth herein, and OMMS wishes to provide such services.

NOW THEREFORE, the parties hereto agree as follows:

Scope of Services

OMMS will provide professional services in the area of an executive search for the position of City Manager. This contract includes a commitment by OMMS that all elements of the search process, services and conditions, listed in the proposal previously submitted to Client:

Proposal for Executive Search Services
City Manager, City of Durant

Term

This contract shall be effective on the date of approval by the Client and shall remain in effect for the period necessary for successful completion of the executive search process. The contract may be terminated upon thirty (30) days prior written notice to OMMS. If the Client terminates the contract, OMMS will then be entitled to any portion of the fee earned up to and including the date of termination.

Professional Service Fee

Professional Services Fee: \$16,900

1/3rd due at notice to proceed, 1/3rd due at the evaluation of semifinalist phase and the remainder due at completion of the interview process.

Expenses Not to Exceed: \$4,500

Expenses include professional recruitment brochure, advertising costs and candidate background checks on selected applicants.

NOTE: Travel costs for the selected candidates are not included in this proposal and, as such, would be the responsibility of the City of Durant.

**Oklahoma Municipal
Management Services**

The Client will mail payments, after proper invoicing, to the following address:

Oklahoma Municipal Management Services
3650 South Boulevard
Edmond, OK 73013

For reporting purposes, the tax identification number for OMMS is 83-1296936.

The fixed professional fee for this recruitment process anticipates no more than five (5) on-site visits. Additional work related to the executive recruitment process, and as specifically requested by the Client, which is outside the scope of this project (i.e., additional on-site visits), will include an additional fee and will be billed at a daily rate of \$375.00 plus reasonable expenses.

Additional Placements

If candidates from this executive recruitment process are selected for another position by the Client, within six (6) months of the recruitment process, a \$5,000.00 lump sum fee will be due and payable to OMMS.

Guarantee

OMMS commits to remain with this recruitment assignment, until the Client has made an initial appointment, for the fee and tasks listed in the proposal.

Devotion of Time

OMMS shall devote such time, to the performance of its duties under this contract, as is necessary for the completion of the project.

Notice

All notices, except payments, hereunder shall be in writing and deemed to have been given when delivered, transmitted by first class, registered or certified mail, postage prepaid and addressed as follows:

If to Client:

City of Durant
ATTN: Mayor Tucker
PO Box 578
Durant, OK 74702-0578

If to OMMS:

Oklahoma Municipal Management Services
ATTN: Executive Director
7633 East 63rd Place, Suite 507
Tulsa, OK 74133

Entire Contract

This contract supersedes any and all other contracts, either oral or in writing, between the parties hereto, with respect to the subject matter hereof, and no other agreement, contract, statement or promise relating to the subject matter of this contract, that is not contained herein, shall be valid or binding.

**Oklahoma Municipal
Management Services**

Amendment

This contract may be amended only by the mutual written agreement of the parties and such written amendment shall become incorporated into the contract once executed by the Client and OMMS.

Legal Construction

In case any one or more of the provisions contained in this contract shall for any reason be held invalid, illegal, or unenforceable in any respect, such invalidity, illegality, unenforceability shall not affect any other provisions thereof and this contract shall be construed as if such invalid, illegal, or unenforceable provision had never been contained herein.

Counterparts

This contract may be executed in counterparts; each such counterpart shall be deemed an original and when taken together with other signed counterparts, shall constitute one contract.

Controlling Law and Venue

All disputes regarding the construction, interpretation, and the parties' rights and obligations under this contract will be governed by the laws of the State of Oklahoma without regard to any conflicts of law provisions. The parties agree to submit to the exclusive venue and jurisdiction of the State of Oklahoma, in District Court, Bryan County, State of Oklahoma.

IN WITNESS WHEREOF, the Durant City Council has appropriated sufficient funds to satisfy the terms and conditions of this contract and executed it on behalf of its Mayor and attested to by the City Clerk, and the OMMS Executive Director has signed and executed this contract, which becomes effective commencing the _____ day of _____, 2023.

ATTESTED AND SEALED:

CITY OF DURANT, OKLAHOMA:

Cynthia Price, City Clerk

Martin Tucker, Mayor

APPROVED AS TO FORM:

OMMS:

Thomas Marcum, City Attorney

Steve Whitlock, Executive Director



August 16, 2023

City of Durant, Oklahoma

City Manager executive search services

August 16, 2023

Ms. Cynthia Price, City Clerk
City of Durant
300 West Evergreen, Suite 100
Durant, OK 74701

Baker Tilly US, LLP
2500 Dallas Parkway, Suite 300
Plano, TX 75093
T: +1 (972) 748 0300
F: +1 (214) 452 1165
bakertilly.com

Delivered electronically to cprice@durant.org.

Dear Ms. Price:

This proposal marks the beginning of a valuable relationship we plan to build with the City of Durant (the City). Based on what we have learned from you in your request for proposal (RFP) process, we are confident we are the right fit to serve you with forward-thinking executive recruitment services so you can keep your focus where it belongs: serving your citizens. Our proposal meets your RFP requirements and describes our unique proposition to meet your key objectives.

We believe that our record of successfully placing qualified and very accomplished professionals, along with our extensive experience providing executive recruitment services to cities, counties, and other public-sector organizations nationwide, will be beneficial for your recruitment and will allow us to find the candidate who has the traits, skills, experience, and overall competence you desire for your organization.

We know that you have options for selecting an executive recruitment firm. However, our unique approach, highly regarded customer service, record of success, experience, and ability to identify, recruit and place top-level executives in similar roles sets us apart from our competitors. Additionally, we offer the following unique features:

- Customized candidate profile
- Management/leadership assessment and reports
- Due diligence, written questionnaire and one-way semifinalists video interviews
- Online application and document management tool

As your Value Architects™, we are determined to support you in achieving your mission to help you identify your next City Manager. Thank you for the opportunity to serve you. Our team is excited to earn your trust, and, as always, we look forward to discussing your questions and feedback.

Sincerely,

BAKER TILLY US, LLP

A handwritten signature in blue ink, appearing to read 'E. Williams'.

Edward G. Williams, Ph.D., Director
+1 (214) 608 6363 | edward.williams@bakertilly.com

A handwritten signature in blue ink, appearing to read 'Anne Lewis'.

Anne Lewis, Managing Director
+1 (703) 923 8214 | anne.lewis@bakertilly.com

Contents

1. EXECUTIVE SUMMARY	1
2. ABOUT BAKER TILLY	6
3. EXPERIENCE IN RECRUITING AND PLACING CANDIDATES	10
4. EXPERIENCE OF INDIVIDUALS	14
5. ITEMIZED SCHEDULE OF COSTS	20
6. PROVIDING RECRUITMENT SERVICES	22
7. COMMUNICATING WITH STAKEHOLDERS	29
8. WORKLOAD FOR CITY COUNCIL AND STAFF	31
9. PROPOSED TIMELINE	32
APPENDIX A: PRIORITIZING DIVERSITY, INCLUSION, BELONGING AND SOCIETAL IMPACT (DIBS).....	34
APPENDIX B: ENGAGEMENT TEAM MEMBER RESUMES	36
APPENDIX C: SAMPLE BROCHURE	47
APPENDIX D: SAMPLE TTI REPORT	52



Baker Tilly is responsive, interactive and produces the results they say they will. We are very pleased with the services they provide and consider Baker Tilly a leader among accounting and advisory firms.

Controller



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1. Executive summary

What makes Baker Tilly different from other firms? Our solution truly begins by listening to what the City of Durant needs.

Understanding your needs to help achieve your objectives and mission

We understand the City of Durant is looking for a timely, effective, efficient, responsive, well-managed and thorough search process to recruit and identify highly qualified candidates for you to identify your next City Manager.

Baker Tilly public sector executive recruiters will collaborate with you or your designated staff to understand the traits, attributes, capabilities, and overall qualifications most important to your organization for this recruitment. The information we gather helps us customize colorful and informative marketing, recruitment and outreach strategies and materials that present the City of Durant as a well-managed, effective, and responsive municipal organization that delivers a full range of services including, but not limited to, public safety, culture and recreation, streets and public works, cemetery, and administrative services. Additionally, we highlight Durant for its ranking as one of the fastest growing cities in the country, the area's abundant recreational opportunities, standing as the second largest city within the Choctaw Nation, and the home of Southeastern Oklahoma State University as additional reasons to consider this outstanding career opportunity. We also highlight the high quality and affordable family-valued lifestyle residents and visitors enjoy year-round, with unique shopping on Main Street and a nationally recognized casino resort with luxurious lodging, outstanding dining, and 24/7 entertainment. Essentially, we share with prospective applicants what anyone who lives or visits Durant knows the City of Durant is a great place to live, work and play.

We recognize there is significant competition for experienced local government managers, leaders and executives today. For this reason, we collaborate with you to develop recruitment strategies that include an aggressive marketing, recruiting and candidate outreach campaign. As you know, successful recruitment often depends upon reaching successful executives who may not necessarily be searching for new employment opportunities or may be waiting for the right opportunity. Thus, we use our existing resources, successful methods, and approaches to inform and encourage qualified professionals to consider and apply for opportunities such as those you may have in your organization. These efforts ensure that your City Council receives and can select from many qualified candidates.

Baker Tilly manages and tracks applicant information and provides regular communication, updating the applicants on the status of each recruitment. Our communications are always professional and respectful.

We take pride in our ability to provide your City Council with comprehensive details and information about each candidate we present, expanding beyond applications, cover letters, and resumes to understand better, compare and contrast individual professional experience, leadership traits and the management style they would bring to your organization. Furthermore, we explore and attempt to understand their motivation for pursuing each career opportunity. We also can provide you with a fully customized interview process to include suggested questions, interview day scheduling and planning as you deem necessary or appropriate. Additionally, the lead consultant is available to you or your designee before, during and after each interview session and can facilitate your deliberations, employment offer, and negotiations with the individual you select as a finalist.

Familiarity with federal, state, and local laws and rules governing the search process

The Baker Tilly public sector executive recruitment team has a long history of conducting successful recruitments for cities and counties nationwide. Since 2000, we have conducted more than 1,700 recruitments nationwide and believe it is important to advertise nationally, yet we utilize a regional focus to attract candidates that are more knowledgeable about the nuances of working in Oklahoma.

We remind candidates throughout the process that any information provided during the process could become public information. We believe in transparency and always provide our clients with an applicant list of all candidates as well as a digital packet of applicant materials for review and retention by the City.

Because of our extensive experience, Baker Tilly's public sector executive recruitment team has the knowledge and perspective to provide "best practice" suggestions we have used with other cities and counties nationwide to ensure the development of a seamless and transparent process to narrow down the field of qualified candidates, conduct comprehensive background reviews and recommend a variety of public interview process options that we customize to the City's unique needs – while complying with all state and local laws, as well as other local Open Meetings Acts.

Knowledge of the economic and political environment in the state of Oklahoma as it pertains to municipal operations

One of the benefits of hiring the Baker Tilly Public Sector Executive Recruitment team is our experience, knowledge and record of success working with divergent political ideologies. Our process requires that we meet with each elected official individually to learn about their vision, desired traits, attributes, characteristics, and overall qualifications of your next City Manager. We then use the information gathered to develop a desired candidate profile, and a process that considers the views of each elected official or appointing authorities. We understand that all politics is local, vital and important to the individual stakeholders, and we work with each appointing authority, recognizing the inherently political nature of the process without becoming political.

Enhancing and protecting your value: our future together

We are prepared to tailor our service methodologies to your specific needs and develop real outcomes for your organization's challenges — as evidenced by our team's understanding of the City of Durant and the distinctive factors that impact your organization. We will continue to deepen our understanding of the City's objectives and are ultimately dedicated to helping you achieve your mission. **After all, your mission is our mission.**

State and local government clients like the City of Durant are central to our executive recruitment practice, and we apply experience-based insight to help fill your recruitment needs — the following table details how we plan to address your needs in a valuable way.

TASKS	PROCESS
1. Recruitment brochure development and advertising	We schedule and meet with the City Council and key stakeholders, as instructed, to understand your leadership vision, strategic direction and candidate expectations, then use the information we gather to develop a candidate profile, which will require your input and final approval. We consider the profile our search baseline.
2. Execution of recruitment strategy	Using your approved profile, we develop a colorful, informative and appealing brochure. Then, we embark on a national or regional targeted

1. EXECUTIVE SUMMARY

TASKS	PROCESS
and identification of quality candidates	marketing, recruitment and outreach campaign to identify individuals who best match your desired profile. • Additionally, we launch a direct applicant outreach campaign targeting eligible prospects we identify by building a detailed query into our searchable applicant database. • We use NeoGov as our online application system. It provides for efficient management of applications and allows us to communicate in real-time with applicants, engaging and informing them of each step in the search process.
3. Screening of applications, review of semi-finalists and selection of finalists	• Once we identify those applicants who most closely match your desired profile, we assign them several tasks, including our due diligence and candidate questionnaires. • The engagement team conducts a comprehensive web and social media review to elicit information relevant to employment and continuation in the process. • We also provide selected applicants with a link that will take them to our one-way video interview portal. The candidates complete a one-way video interview, answering questions designed to give us an additional perspective on each applicant's candidacy related to your desired profile. • Once we gather the responses from the items listed above, we prepare and provide you with an electronic Semi-Finalists Report listing 10 to 12 applicants who best appear to meet your desired profile. This report includes a list of all applicants and copies of resumes, cover letters and due diligence questionnaire responses. • We then ask you to identify four or five, plus one alternate, as finalists. We ask this group to complete our management and leadership style assessment, which provides us with additional information, including development needs, strengths, personality and behavior analysis. This tool provides information about each finalist, which is essential to the selection process.
4. Background report checks, reference checks, social media presence, academic verifications	• We secure authorization from each finalist to conduct a comprehensive background record check and reports. • We obtain a list of up to 10 current or former supervisors, peers or direct reports from each finalist to contact as references. • We provide a report summarizing all responses to our customized reference questionnaire. • We verify academic credentials and professional certifications. • We extensively review social and electronic media sites and other publications to identify any information relevant to hiring one of the finalists you interview. • We provide a comprehensive reference check and report for each finalist.
5. Final interview process	• Once you identify your finalists, we collaborate with your designated staff to design, prepare and provide technical support to ensure a smooth, effective and efficient interview process, which may include the scheduling and support for virtual interviews. If requested, we work with the selected finalist and your designated staff to finalize an employment agreement.

THERE ARE NUMEROUS BENEFITS TO UTILIZING BAKER TILLY FOR YOUR RECRUITMENT NEEDS

We strive to distinguish ourselves from peer organizations.

Why Baker Tilly is ideally suited to serve Durant

Baker Tilly has distinguished itself from public sector executive recruitment peers in many ways. What makes Baker Tilly different from other firms? **Our executive recruitment solution truly begins with your needs.** The City of Durant deserves to collaborate with a provider that goes beyond checking your recruitment boxes through proactive, responsive insights, a tailored approach and communication. We encourage you to consider how the unique combination of our qualifications makes us the right fit to serve the City — today and for years to come.

WHAT WE UNDERSTAND THE CITY NEEDS	HOW WE WILL DELIVER
Carefully structured process supported by technology	- Comprehensive and seamless process refined by years of interaction with local government, not-for-profit employers, and prospective candidates. - Leverage the search process with technology tools, including a video interview system, management/leadership style assessment analysis and online application platform. - Efficient management of candidate information and providing the City Council with unique information about each candidate's leadership and management style and ability to respond extemporaneously to video questions.
Public sector recruiting specialization and experience	- Experienced executive recruitment professionals passionate about local government since all have spent a significant part of their professional careers in senior leadership positions for cities, counties and school districts. - Successfully recruited more than 1,700 executive-level positions within cities, counties, school districts and public and not-for-profit organizations since 2000.
Thorough candidate evaluation	- Active recruitment of qualified candidates, drawing from our extensive personal and professional connections with capable individuals, assuring the City's access to established managers and rising stars. - Thorough evaluation of the final candidates, including detailed information from references and a careful review of background records to ensure sound professional and personal character.
Diversity in executive recruitment	- Committed to diversity in executive recruitment as a reflection of our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. - Ensure diversity is a focus of our recruitment strategy and candidate pools through involvement with the National Forum for Black Public Administrators (NFBPA), their Corporate Advisory Council, and other organizations.
Delivering value on the City's budget	- Full-service engagement includes advertising, preparation of a recruitment brochure, background, reference and academic verification checks and up to three on-site visits. - Work closely to meet the City's needs and any unexpected circumstances that may arise during your recruitment to expedite the recruitment, but not at the expense of finding high-quality candidates.
Triple Guarantee	Focus on assisting with your executive recruitment until you make an appointment.

1. EXECUTIVE SUMMARY

WHAT WE UNDERSTAND THE CITY NEEDS	HOW WE WILL DELIVER
	• Guarantee your executive recruitment for 12 months against termination or resignation for any reason — or we come back to fill your City Manager position for no additional professional fee. • Commitment not to directly solicit any candidates selected under this contract for another position while employed with your organization.
Transparency and confidentiality	• No preconceived notions or expectations about the City and prospective candidates. • Work closely with the City to make sure the process is transparent. • Ensure applications are kept confidential, where permitted by state and local laws, to ensure candidates can express interest without jeopardizing current employment to maximize the number of qualified applicants.
Keeping the City involved and minimizing disruption	• Comprehensive process incorporates the active participation of the City Council at critical steps. • Keep decision-makers fully advised and informed of all aspects of the process without requiring them to expend substantial time or put aside other pressing issues. • City staff can focus on their primary and assigned functions while Baker Tilly manages the search process.

BAKER TILLY DIFFERENTIATES ITSELF FROM OTHER EXECUTIVE RECRUITMENT FIRMS

The City of Durant will benefit from our understanding of best practices within the executive recruitment space.

2. About Baker Tilly

Our firm has the reputation, resources and reach to address the challenges you face as a public sector organization — both now and in the future.

Offering our resources: Baker Tilly at a glance

We dedicate ourselves to delivering efficiency, quality, creativity, innovation and forward-thinking solutions to public sector clients. Baker Tilly is passionate about enhancing and protecting our clients' impact, which is a collective effort by everyone across our firm. **Our public sector team maintains a separate practice group of approximately 350 team members devoted to serving clients like you.** The City of Durant will receive an exceptional executive recruitment experience. Below are some key facts about our firm.



550+

administration
recruitments



1,700+

recruitments
since 2000



50+

office locations
across the U.S.



250+

workplace and
culture awards

COMPREHENSIVE EXPERIENCE TO SERVE YOU

The City of Durant will receive support and guidance from a respected firm that continues to grow.

Celebrating more than 90 years serving our valued clients

As a future-looking firm, we celebrate more than 90 years in the marketplace by honoring our roots and continuing to shape our future. We embrace the fact that business can't stand still — and we won't stand still. As we help our clients identify new needs and opportunities, we innovate and change to work better.

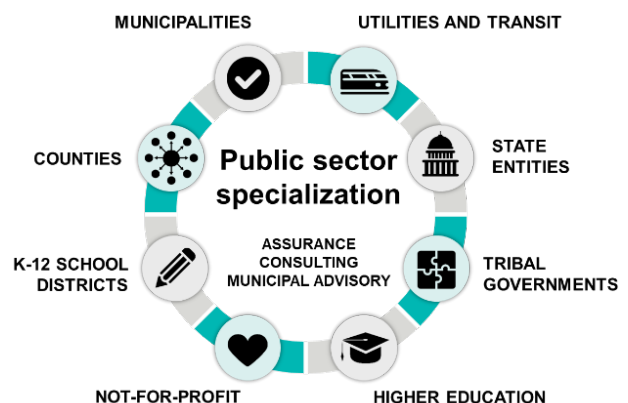


Our roots took hold in 1931 in Waterloo, Wisconsin, where we began as a public accounting firm specializing in canning factory audits. Since that time, we have grown with more than 40 different business combinations, each with its own rich history, expanding our presence coast to coast and globally and expanding our scope across industries, services and areas of expertise. One thing has not changed over time: **our shared passion for enhancing and protecting our clients' value.**

As we reimagine our lasting impact, we remain grounded in our timeless core values. Through dedication, creativity and adaptability, Baker Tilly will become more connected to our clients, our people, our communities and our profession.

Public sector specialization

Baker Tilly has served local governments since our establishment more than 90 years ago. We are one of the few professional services firms with a state and local government practice dedicated entirely to serving governmental clients.



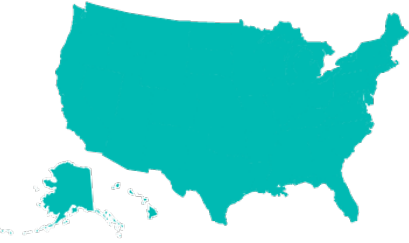
2. ABOUT BAKER TILLY

Unlike many of our contemporaries, Baker Tilly is organized by industry rather than service line. What does this mean for Durant? It means you will be served by a carefully selected team that blends our public sector-focused professionals with experienced specialists in executive recruitment projects. The City will collaborate with knowledgeable professionals who understand your challenges and provide innovative solutions to help you overcome them.

State and local government is a complex, unique environment shaped by fiscal, regulatory and operational considerations not found in other industries. State and local governments were among Baker Tilly's first customers. Recognizing this complexity and eager to serve as a true **Value Architect™** to the industry, Baker Tilly formalized its dedicated public sector specialization more than **60** years ago.

More than 350 Baker Tilly professionals — including nearly 30 partners and principals — focus directly on serving state and local governments, providing hundreds of thousands of client service hours annually to the public sector. **Our practice serves nearly 4,000 state and local government entities** nationwide, including cities, counties, municipalities, school districts, public utilities and transit organizations. Your team is ready to help you solve the obstacles between you and your goals.

Public sector: Experience that matters



4,000+ public sector clients**90+ years of industry experience****Serving clients nationwide**

SUPPORTING STATE AND LOCAL GOVERNMENTS WITH SPECIALIZED EXPERTISE

The City of Durant will benefit from the insight Baker Tilly has gained from serving thousands of public sector clients across the United States

Celebrating our recent combination with Management Partners

In October 2022, Management Partners combined with Baker Tilly to create a premier public sector consulting practice. The fast pace of change in local government — from towns to cities to counties — is not slowing down. To continue serving and improving communities, local leaders need trusted consultants to help navigate change. This combination adds a unique and significant layer of experience to Baker Tilly's robust public sector practice. Our project team members are former local government leaders and managers stemming from all operational facets. They have nearly three decades of field-tested techniques and proven methodologies.



Organizational management and human capital services

OUR COMBINED SERVICES INCLUDE:

• Classification and compensation	• Organizational assessments	• Organization development
• Executive recruitment	• Executive coaching	• Succession planning
• Performance management	• Management services	• Process improvement
• Strategic and business planning	• Financial planning, budgeting and analysis	• Service sharing and service consolidation
• Performance assessment	• Internal audit	

MEETING THE CITY OF DURANT'S HUMAN CAPITAL NEEDS

Baker Tilly provides a full array of organizational management and human capital services designed to meet state and local governments' unique needs.

Project contacts and locations

AUTHORIZED REPRESENTATIVE	ENGAGEMENT TEAM LEADER
Anne Lewis, Managing Director 8219 Leesburg Pike, Suite 800 Tysons, VA 22182 +1 (703) 923 8214 anne.lewis@bakertilly.com	Dr. Edward G. Williams, Director 2500 Dallas Parkway, Suite 300 Plano, TX 75093 +1 (214) 608 6363 edward.williams@bakertilly.com

Sharing a culture of values with the City of Durant to serve as the foundation of our lasting relationship

Our core values infuse our culture and drive the way we plan to work with the City of Durant. They are what we believe in and what we expect from each other. They guide our decisions, inspire our actions and impact how we do business. They are shorthand for what we stand for — and what we stand against. Our core values are fundamental and timeless and come to life through our own experiences and personal expression. These core values are highlighted below.

				
BELONGING We foster a deep level of mutual respect where each one of us feels seen, heard, valued and connected. We commit to a diverse and inclusive workplace upheld by fairness, compassion and equality.	COLLABORATION We are at our best when we work together. We build on our collective strength to achieve more than we can as individuals.	INTEGRITY We do the right thing, for the right reason, every day. Honesty, trust and keeping our promises are paramount to our success.	PASSION We put forth our best effort every day for the benefit of our people, clients and firm. There is a sense of urgency and relentless energy in everything we do. We love our profession and take great pride in it.	STEWARDSHIP We invest for the future with the intention of leaving everything better. We strive to make a positive difference and leave a proud legacy.

SHARED CULTURES, VALUES, PHILOSOPHIES AND GOALS

The City of Durant and Baker Tilly have a strong cultural fit, and our commonalities will lay the foundation for trust, open communication, a seamless project approach and an enduring relationship.

Belonging is a core value at Baker Tilly. It is who we are rather than what we do. Each team member commits to upholding a diverse and inclusive workplace driven by fairness, compassion and equality. Inclusiveness and belonging empower us to achieve better business results. Please refer to **Appendix A** for more information on our firm's commitment to diversity, inclusion and belonging.

Serving Durant effectively from anywhere

Baker Tilly goes to market by industry and service specialization, so we assign team members based on skill set rather than geographic location. Each team member selected to serve the City will bring individual strengths that directly benefit your engagement. Based on our understanding of your needs, we can provide the best service by managing our relationship with the City out of our Plano, Texas office based on a similar experience serving organizations like yours.

Your engagement team has the technology tools to support the City in meeting objectives from anywhere. All of this is familiar to our Baker Tilly professionals. We have led a borderless client service approach for many years and are adept at providing a seamless remote experience for all clients, whether down the street, on the other side of the country or across the ocean. Every Baker Tilly professional receives a laptop and remote access credentials to connect to our internal network resources from outside the office.

Your team is only a day away from face-to-face meetings, if appropriate — the same level of commitment we provide “local” clients. When we cannot meet in person, we leverage Microsoft Teams, our web conferencing software, to host remote meetings. It is almost as good as being in the same room and saves everyone time, cost and carbon footprint. This approach has been very successful for similar clients, and we will ensure it is successful for you.



Proactive, ongoing dialogue: Frequent informal conversations, regular status meetings and periodic phone calls as questions arise help us to stay current with your needs and avoid last-minute surprises. As the engagement progresses, we will share findings, ideas and suggestions..



Accessibility and responsiveness, with access to a local office: Responsiveness is at the heart of our relationship, and your team members are committed to responding to most engagement requests within one business day.



Leveraging technology: Baker Tilly invests in innovation and technology tools to support real-time communication – both internally among Baker Tilly team members and with you as our client. Collaboration software tools such as Microsoft Teams allow for remote check-ins and the ability to work together anywhere, anytime and on any device.

The Baker Tilly executive recruitment team will work closely with the City's designated point of contact to develop methods to complete all aspects of our established search processes using existing technologies and ensure the overall safety of all involved, which may require virtual or telephonic meetings or interviews. Notwithstanding, we will creatively collaborate with your organization to gather and provide you with critical information essential to your hiring decisions.

When the time arrives for the City Council to interview candidates, we will respect and comply with the guidelines established and recommended by local, state or federal public health or medical professionals, including social distancing and related guidelines or protocols, as necessary.

3. Experience in recruiting and placing candidates

We are always happy to provide references because it is important for you to talk with the organizations we serve. Our similar client base equals experience-derived insights for Durant.

Demonstrating successful relationships with similar clients

Dr. Williams is the designated project leader for your City Manager executive search. We encourage you to connect with the clients below to learn more about the value of their relationship with Baker Tilly and to verify the quality of work Baker Tilly has consistently delivered to each client as part of these recently completed executive recruitment projects. Each client will offer a unique perspective as you consider your own needs.

CITY OF CORPUS CHRISTI, TEXAS			
Name	Eyvon McHaney	Title	Human Resources Director
Phone	+1 (361) 826 3979	Email	EyvonMc@cctexas.com
Services	Director of Animal Care Services (current), City Auditor (2022), Director of Community Health (2022), Assistant Information Technology Director (2022), Assistant City Manager (2021,2022) and Chief Executive Officer – Utilities (2021) executive recruitments.		
CITY OF BEEVILLE, TEXAS			
Name	Gabriela Hernandez	Title	City Secretary
Phone	+1 (361) 358-4641_Ext 220	Email	gabby.hernandez@beevilletx.org
Services	City Manager executive recruitment (2020)		
CITY OF PARIS, TEXAS			
Name	Gene Anderson	Title	Finance Director
Phone	+1 (903) 249-2800	Email	ganderson@paristexas.gov
Services	City Manager executive recruitment (2020)		
CITY OF BUDA, TEXAS			
Name	Vicki Fuchs	Title	Human Resources Director
Phone	+1 (512) 523-1043	Email	vfuchs@ci.buda.tx.us
Services	City Manager executive recruitment (2022)		

PROVIDING VALUABLE PERSPECTIVES FROM CURRENT CLIENTS

At Baker Tilly, relationships matter. Our Value Architects™ have a record of successfully enhancing and protecting similar clients' impact — resulting in experience-based insights for the City of Durant.

3. EXPERIENCE IN RECRUITING AND PLACING CANDIDATES

Providing similar services to clients

We have recently provided recruitment services to the following Oklahoma organizations:

- Oklahoma Municipal Assurance Group Chief Executive Officer
- Norman City Manager
- Chickasha Police Chief

Below is a partial list of relevant public sector executive recruitments delivered by the Baker Tilly team since 2018.

LIST OF RELEVANT PROJECTS: 2018 — PRESENT				
Year	Client	State	Project	Population
Current	Bemidji	MN	City Manager	14,570
Current	Canfield	OH	City Manager	7,605
Current	Fernley	NV	City Manager	22,343
Current	Freeport	ME	Town Manager	8,737
Current	Greenbelt	MD	City Manager	24,921
Current	Huber Heights	OH	City Manager	43,439
Current	Perrysburg	OH	City Administrator	21,730
Current	West Fargo	ND	City Administrator	38,626
2023	Belle Meade	TN	City Manager	2,912
2023	Beloit	WI	City Manager	36,657
2023	Carrboro	NC	Assistant Town Manager	21,230
2023	Fargo	ND	City Administrator	121,889
2023	Highland Park	TX	Town Administrator	8,993
2023	Midland	TX	City Manager	132,520
2023	Morehead City	NC	City Manager	9,556
2023	Portland	ME	City Manager	66,595
2023	Spartanburg	SC	Assistant City Manager	38,732
2023	Warrenton	VA	Town Manager	10,057
2023	Wyoming	MI	City Manager	76,501
2022	Apex	NC	Assistant Town Manager	58,780
2022	Beaumont	TX	City Manager	118,428
2022	Belton	MO	City Manager	23,480
2022	Blue Springs	MO	City Administrator	54,850
2022	Branson	MO	City Administrator	10,000
2022	Brevard	NC	City Manager	7,900
2022	Buda	TX	City Manager	15,108
2022	Denton	TX	City Manager	136,195
2022	Evans	CO	City Manager	22,165
2022	Golden	CO	City Manager	20,399
2022	Harrisonburg	VA	City Manager	54,033
2022	Hastings	NE	City Administrator	25,152

3. EXPERIENCE IN RECRUITING AND PLACING CANDIDATES

LIST OF RELEVANT PROJECTS: 2018 — PRESENT				
Year	Client	State	Project	Population
2022	Hutchinson	KS	City Manager	40,006
2022	Joplin	MO	Assistant City Manager	50,386
2022	Kinston	NC	City Manager	20,083
2022	La Marque	TX	City Manager	16,627
2022	Minnetrista	MN	City Administrator	7,621
2022	Oak Hill	TN	City Manager	4,587
2022	Oakland	CA	Deputy City Admin	440,646
2022	Overland Park	KS	City Manager	191,278
2022	Plain City	OH	Village Administrator	4,065
2022	Port Arthur	TX	Assistant City Manager	53,937
2022	Salisbury	NC	City Manager	33,727
2022	Shorewood	MN	City Administrator	7,974
2022	Spicer	MN	City Administrator	1,188
2022	Staunton	VA	City Manager	25,750
2022	Westminster	CO	City Manager	116,317
2022	Willmar	MN	Asst City Administrator	19,628
2021	Carrboro	NC	Town Manager	21,230
2021	Clearwater	FL	City Manager	115,159
2021	College Park	MD	City Administrator	32,196
2021	Corpus Christi	TX	Assistant City Manager	323,733
2021	Evansville	WI	City Admin/Finance Director	5,378
2021	Grand Rapids	MI	Deputy City Manager	192,294
2021	Greeley	CO	City Manager	105,888
2021	Inver Grove Heights	MN	City Administrator	34,344
2021	Kimball	NE	City Administrator	2,578
2021	Long Grove	IL	Village Manager	7,956
2021	Louisville	CO	City Manager	20,860
2021	Moline	IL	City Administrator	41,902
2021	Riverside	OH	City Manager	25,093
2021	Rockville	MD	Deputy City Manager	66,940
2021	Shakopee	MN	Assistant City Administrator	40,731
2021	Sidney	OH	City Manager	20,590
2021	Stonecrest	GA	City Clerk	54,202
2021	Woodlawn	OH	Village Manager	3,365
2020	Clayton	OH	City Manager	13,269
2020	Fairmont	MN	City Administrator	10,126
2020	Front Royal	VA	Town Manager	15,239
2020	Herington	KS	City Manager	2,304
2020	Kansas City	MO	City Manager	488,943
2020	Lake Ozark	MO	Asst City Admin/Community Eco Dev Director	1,792

3. EXPERIENCE IN RECRUITING AND PLACING CANDIDATES

LIST OF RELEVANT PROJECTS: 2018 — PRESENT				
Year	Client	State	Project	Population
2020	Maple Plain	MN	City Administrator	1,807
2020	Matanuska-Susitna Borough	AK	Borough Manager	108,317
2020	Middletown	OH	City Manager	48,121
2020	Missouri City	TX	City Manager	74,705
2020	Moose Lake	MN	City Administrator	2,798
2020	Oakdale	MN	City Administrator	28,083
2020	Rochester	MN	City Administrator	114,011
2020	Scottsbluff	NE	City Manager	14,874
2020	Springdale	OH	Assistant City Administrator	11,223
2020	St. Joseph	MO	City Manager	74,959
2019	Beeville	TX	City Manager	12,937
2019	Cloquet	MN	City Administrator	11,938
2019	Forest Park	OH	City Manager	18,723
2019	Hobbs	NM	City Manager	37,764
2019	Lake Lotawana	MO	City Administrator	2,099
2019	Minerva	OH	Village Administrator	3,640
2019	Norman	OK	City Manager	122,843
2019	Paris	TX	City Manager	24,800
2019	Park City	KS	City Administrator	7,499
2019	Port Arthur	TX	City Manager	53,937
2019	Santa Fe	NM	City Manager	83,776
2019	Willmar	MN	City Administrator	19,628
2018	Addison	TX	City Manager	15,368
2018	Asheville	NC	City Manager	89,121
2018	Ashland	OR	City Administrator	21,636
2018	Avondale	AZ	City Manager	89,330
2018	Belle Plaine	MN	City Administrator	6,838
2018	Billings	MT	City Administrator	110,323
2018	Burnsville	MN	City Manager	61,434
2018	Christiansburg	VA	Town Manager	21,533
2018	Grand Rapids	MI	City Manager	192,294
2018	Kingman	AZ	City Manager	29,029
2018	Maricopa	AZ	City Manager	46,903
2018	Montgomery	OH	City Manager	10,440
2018	Mora	MN	City Administrator/Public Utilities GM	3,453
2018	Salina	KS	City Manager	46,994
2018	Shawnee	KS	City Manager	64,323
2018	Springdale	OH	City Administrator	11,223
2018	York	PA	Business Administrator	43,859

4. Experience of individuals

Durant will work with a consistent team of Value Architects™ who understand your organization and can add value from day one. The combination of your engagement team's executive recruitment experience and service knowledge translates into tangible results for the City.

Aligning key engagement team members with your goals

Within Baker Tilly, our executive recruitment team comprises 11 recruitment consultants and project coordination staff available to meet your executive recruitment needs. Each consultant assigned to your recruitment has experience working with cities, counties, special districts, not-for-profit organizations and school districts, and the many disciplines comprising the City of Durant's organization. Our consultants bring an experienced, participatory and energetic perspective to each engagement. As such, we reflect our unique approach and individualized touch in our internal standard and commitment to outstanding service that meets or exceeds your expectations. Since 2000, our combined consultant team has conducted more than 1,700 executive searches.

1,700+ recruitments

Your engagement team has conducted more than 1,700 successful recruitment projects since 2000.

The Baker Tilly engagement team will collaborate with the City Council and others designated as your technical advisor. As such, we conduct our recruitment process in a clear, effective, efficient, transparent, and professional manner consistent with "best practices" in the public sector executive recruitment space. Our agenda is clear; "our agenda is your agenda." Our objective is to generate a list of highly qualified candidates and assist you with the screening and evaluation of these candidates to identify your next City Manager.

We have structured the Baker Tilly engagement team to draw upon our 60-plus years of collective service to the public sector and to leverage Baker Tilly's experience and capacity to find exceptional, qualified candidates.

Since its beginnings, our firm has emerged as a leader in human resource management consulting and executive recruitment. Our 45+ years of consulting experience, coupled with our unique approach and personal touch, drives our internal standard for delivering outstanding services and leading-edge results.

The proposed project team represents experienced professionals working on your City Manager recruitment. As such, we have selected a team of consultants who understand the traits, attributes and characteristics essential to success in this position to meet four specific objectives for your organization. First, this team represents experienced professionals who will directly champion every aspect of your project to a successful culmination. Second, the team brings expertise to identify and classify competent applicants according to your business service requirements. Third, this team brings a national perspective, experience and the knowledge necessary to achieve your objectives. Fourth, our approach exemplifies our commitment to personal and professional responsibility for the services and outcomes we deliver to Durant.

4. EXPERIENCE OF INDIVIDUALS

Your handpicked team of professionals offers a collaborative focus supported by the breadth and depth of our firm's national resources. We believe in strong personal relationships, which means a personal interest in the City of Durant from some of our most experienced team members. Engagement team members are introduced below; complete resumes are available in **Appendix B**.

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR DURANT

Engagement leadership



Edward G. Williams, Ph.D. — Director

2500 Dallas Parkway, Suite 300, Plano, TX 75093
+1 (214) 842 6478 | edward.williams@bakertilly.com

Edward has more than 20 years of collective experience in human resources and organizational development at various levels and disciplines, including state and municipal government, community and educational institutions. His areas of expertise include human development, process improvement, workforce planning, executive recruiting, strategic planning, management and leadership development, classification, compensation, benefits administration, performance management, employee recognition, employee wellness and benefits administration. He has served as director of human resources and organizational development for the City of Missouri City, deputy personnel director for the State of Missouri and training and performance consultant for the Metropolitan Community Colleges Business and Technology Center in Kansas City, Missouri. Edward holds a Ph.D. in Educational Leadership and Policy Analysis from the University of Missouri, an Educational Specialist degree in Higher Educational Administration, a Master of Higher Education Administration, and a Bachelor's in Education from the University of Missouri. He is bilingual and proficient (reading, writing, and speaking) in Spanish.

Consulting team



Art Davis — Director

5440 West 110th Street, Suite 300, Overland Park, KS 66211
+1 (816) 868 7042 | art.davis@bakertilly.com

Art is a director in Baker Tilly's executive recruitment practice. He is responsible for managing and conducting executive recruitment engagements for the firm to ensure their integrity, timeliness and adherence to budget parameters. He has more than 30 years of experience in local government, executive recruitment and organizational management. Art has served as a city administrator in Missouri and other local government positions in Kansas. He specializes in providing executive recruitment and organizational management consulting services for cities, counties and not-for-profits. Art earned a Master of Public Administration from the University of Kansas and a Bachelor of Arts in political science and public administration from William Jewell College.



Patricia Heminover — Director

30 East Seventh Street, Ste. 3025, St. Paul, MN 55101
+1 (651) 223 3058 | patty.heminover@bakertilly.com

Patty has been with the firm since 2010. She has more than 20 years of public education experience, most recently as superintendent of South St. Paul Schools in South St. Paul, Minnesota. She brings considerable experience developing budgets, leading organizational and process improvements, and successfully overseeing conflict resolution. Patty was South St. Paul Schools' director of human resources and finance before serving as its superintendent. She served for three years as the co-superintendent of schools for Cleveland Public Schools in Cleveland, Minnesota, after working as its

4. EXPERIENCE OF INDIVIDUALS

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR DURANT

director of human resources and business services for six years. Patty received a School Finance Award and technology leadership awards and helped establish Minnesota's first K-12 International Baccalaureate School District. She earned a Master of Education Administration from Minnesota State University.



Nancy Hetrick — Managing director

267 East Campbell Ave, Suite 200, Campbell, CA 95008
+1 (408) 385 3412 | nancy.hetrick@bakertilly.com

Nancy is an experienced facilitator with expertise in strategic planning, team building, and facilitating problem-solving and process improvement initiatives. In addition, she is skilled in performance management, succession planning, organizational and process improvement, and budget development. Nancy led the County of San Mateo's outcome-based management program and has supported local government clients with designing and implementing performance measurement systems. Nancy is an excellent facilitator and trainer. She has developed curriculum and conducted training on a wide variety of topics and routinely facilitates priority-setting and team building workshops for cities, counties and non-profit boards. Nancy is certified to administer the Myers-Briggs Type Indicator assessment instrument. Since her return to Management Partners in 2006, she has led projects with local governments, including the Bay Area cities of Rohnert Park, Redwood City, San Carlos, Fairfax, Orinda, Merced, Martinez, San Jose and Santa Cruz; the Sacramento Area Council of Governments; the Peninsula Library Partnership; and the Bay Area Counties of Alameda, San Mateo, Marin, Monterey, and Santa Clara.



Yolanda Howze, MPA, IPMA-SCP, SPHR, SHRM-SCP — Director

205 North Michigan Avenue, 28th Floor, Chicago, IL 60601
+1 (312) 240.3401 | yolanda.howze@bakertilly.com

Yolanda is a well-regarded, award-winning human resources professional with more than 20 years of public sector human resources experience—primarily in municipal government. Yolanda was assistant to the city manager/director of human resources with the City of University City, Missouri and director of human resources with the City of Bellaire, Texas. Before joining Baker Tilly, Yolanda was a senior consultant II with Gallagher's Human Resources Compensation & Consulting practice. She was responsible for managing projects and providing consulting services to public sector and higher education clients in all aspects of classification and compensation systems and other areas of human resources. As a human resources leader, Yolanda's experience and competencies include full cycle recruiting and retention (including executive recruiting), total rewards and classification administration, performance management, project management, HRIS and process improvement, change management, labor relations, emergency management and disaster recovery, training and organizational development, and safety and risk management. Yolanda earned a dual Bachelor of Arts in psychology and organizational leadership from Maryville University in St. Louis and a Master of Arts in public administration and policy analysis from Southern Illinois University-Edwardsville. Yolanda is also a Senior Certified Human Resources Professional—SPHR, SHRM-SCP, IPMA-SCP. Her peers selected her as the 2015 Texas Municipal Human Resources Association (TMHRA) Human Resources Professional of the Year.

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR DURANT



Anne Lewis, Managing director

8219 Leesburg Pike, Suite 800, Tysons, VA 22182
+1 (703) 923 8214 | anne.lewis@bakertilly.com

Anne leads Baker Tilly's public sector executive recruitment team. Before joining Baker Tilly, Anne was an assistant county administrator for a Virginia county, a deputy city manager and an assistant city manager for two Virginia cities. Over the last 17 years, her experience in local government has also included positions as an emergency management deputy director, public information officer, human resources manager, parking authority executive director, housing director, transit director and convention & visitor's bureau executive director. She also had responsibility for parks, recreation and community services, information technology, animal services, general services and legislative programs. She specializes in providing executive recruitment services to local governments and nonprofits. Anne holds a Master of Science and a Bachelor of Science from Shenandoah University.

Supporting team



Karen Edwards, SHRM-CP — Senior recruitment analyst

+1 (813) 915-5616 | karen.edwards@bakertilly.com

Karen is a senior recruitment analyst with Baker Tilly's executive recruitment practice group. Her responsibilities include assisting in the coordination of executive recruitments. Karen manages outreach, generates reports, conducts detailed background checks and analyzes data to ensure the success of all engagements. She has more than 30 years of experience in human resources, administrative positions and customer service. Karen earned a Bachelor of Science in business administration - human resource management from Western Governors University and is a Society for Human Resources certified professional.



Michelle Lopez — Manager

+1 (651) 223 3061 | michelle.lopez@bakertilly.com

Michelle is a manager with Baker Tilly's executive recruitment practice group. Known for her attention to detail and organizational skills, Michelle plays a crucial role in ensuring that recruitment projects are completed thoroughly and on time. She has more than 10 years of experience as a key support staff member. Her colleagues appreciate her customer service skills and determination to ensure clients and candidates remain informed and engaged throughout the recruitment process. Her responsibilities include organizing assignments and workflows, coordinating information and resources, and identifying, analyzing, and implementing solutions to ensure her team and clients always have the latest recruiting tools at their disposal. She is currently pursuing a Bachelor of Science degree in organizational leadership.



Diane Segulia — Recruitment analyst

+1 (651) 223 3094 | diane.segulia@bakertilly.com

Diane is a recruitment analyst with Baker Tilly's executive recruitment practice group. She is a team player who prides herself on delivering high-quality work. Diane joined Baker Tilly in 2015 as the receptionist. She joined the executive recruitment practice group as an administrative assistant in October 2019 and began her role as a recruitment analyst in June 2022. Her responsibilities include conducting research for the consultants, completing background checks, coordinating information and

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR DURANT

resources, and collaborating with candidates and clients through all phases of executive recruitment.



Carrie Thompson — Recruitment analyst

+1 (703) 923 8040 | carrie.thompson@bakertilly.com

Carrie is a recruitment analyst with Baker Tilly's executive recruitment practice group. She has more than four years of experience in recruiting coordination, including interview scheduling and candidate communication. She facilitates smooth sailing during the recruitment process. Carrie runs reports, coordinates outreach and organizes essential documents. Along with her work behind the scenes, she collaborates with clients and candidates to help them on their journey to success. Carrie earned a Bachelor of Arts in communication with a concentration in media production and criticism from George Mason University.

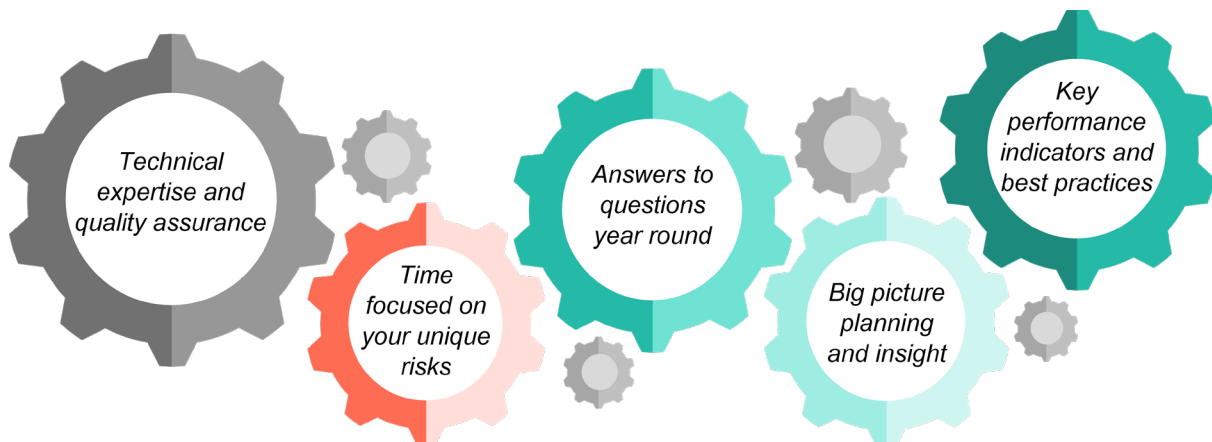
THE CITY OF DURANT WILL RECEIVE TANGIBLE RESULTS WITH BAKER TILLY

All engagement team members are committed to Durant's success. Their industry experience and service expertise translates into tangible results for the City.

Building trust and maximizing value with significant team member involvement

Your experienced engagement team members will be responsive to your needs, quickly resolve challenges and build trust. You can expect to receive technical insights and an approach customized to your unique structure, culture, timing and strategic goals.

We are ready to serve you when you need us, where you need us and for as long as you need us. Whether it is an early-morning phone call or late-night email, we are here to give you peace of mind when it comes to executive recruitment. The graphic below details how we will build trust and maximize value with the City of Durant.



COLLABORATING WITH YOU AS YOUR TRUSTED VALUE ARCHITECT™

Your engagement team will be deeply involved in the engagement to give them an in-depth working knowledge of Durant and processes to deliver value throughout the year.

Cultivating an engaging culture to offer a consistent public sector team that will serve you for many years

We view our commitment to staff continuity as the cornerstone of building a lasting relationship with Durant. You can expect to see the same engagement team members for additional recruitment services in the future.

Exceptional professionals thrive at Baker Tilly because we foster an engaging culture through diversity and inclusion, work-life balance, continuous learning opportunities, career advancement and employee recognition. As evidence of our team member-focused culture, Baker Tilly proudly presents a variety of recognitions and awards.

EVIDENCE OF OUR TEAM MEMBER-FOCUSED CULTURE AND COMMITMENT TO EXCELLENCE

Baker Tilly was included in **People Magazine's 2022 Companies That Care** list, which recognizes companies who put their employees and communities first



Ranked as a **top 10 accounting and advisory firm for workplace prestige and quality** on Vault Accounting's Accounting 50 list; **culture** is the number one reason that team members join our ranks and stay at our firm



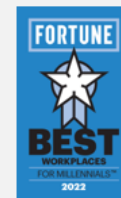
Recognized as **one of America's Best Large Employers** in 2021 and 2022 by Forbes



Baker Tilly has again been certified as one of the **Best Workplaces in Consulting and Professional Services** – one of only 25 companies recognized on this list



Received 250+ culture awards and workplace recognitions firmwide



CULTIVATING AN ENGAGING CULTURE

Our commitment to attracting and retaining a top-quality workforce benefits Durant through engaged team members and staff continuity.

5. Itemized schedule of costs

Value means more than simply checking boxes and meeting your requirements. Value means services that lead to meaningful insights, help improve efficiencies and direct more dollars and resources to achieving Durant's mission.

Delivering a professional fee estimate for the City of Durant

We are excited about the opportunity to work with Durant and have prepared the below fee estimate to meet the City's needs and objectives. Our fees allow for thorough and insightful advice from experienced professionals without unnecessary add-ons or startup charges.

The all-inclusive professional fee includes professional services by the engagement team leader, the project support staff, and all project-related expenses such as advertising, preparation of the recruitment brochure, printing, candidate background, reference and academic verification checks and travel expenses for on-site visits. Baker Tilly is not responsible for candidates' travel expenses to client locations for on-site interviews. Clients generally manage these matters directly with the finalists.

Baker Tilly will bill for this engagement in four installments: 30% upon execution of this agreement, 30% at Phase I, 30% at Phase II, and 10% upon acceptance of an employment offer by the finalist. The fee is not contingent. If you terminate this engagement before completion, Baker Tilly shall invoice the City for any unpaid portion of the fee.

Feel free to direct all questions regarding the professional fee and project-related expenses to Edward Williams via email at edward.williams@bakertilly.com or via phone at +1 (214) 608 6363.

PROPOSED SERVICES	FEES
Phase I	
Task 1 — Project kickoff, candidate profile, development of marketing, recruitment and outreach strategy	\$6,190
Task 2 — Acknowledge applications and begin reviewing and classification of all applicants	\$4,390
Phase II	
Task 3 — Develop and assign due diligence and applicant questionnaires, one-way video interview questions, review responses, prepare electronic Semi-Finalist Report, and selection of potential finalists	\$6,280
Task 4 — Secure up to 10 references, conduct a background check, administer leadership/management assessment, and Finalist Report	\$3,500
Phase III	
Task 5 — Interview process preparation, invitations, technical support, suggested interview questions; final process, and on-site interviews with finalists	\$6,590
Conclusion	
Assistance and technical support for total rewards (salary and benefits), employment offer negotiation, offer and acceptance by finalist	
TOTAL ALL-INCLUSIVE FEE	\$26,950

5. ITEMIZED SCHEDULE OF COSTS

OPTIONAL SERVICES FOR CONSIDERATION	FEE
At your request, Baker Tilly can conduct a web-based community survey to help your organization identify key issues or priorities that your organization may consider as you launch an executive search. Depending on your need, we administer the survey, which your residents, community leaders, employees or designated key stakeholders may complete. Please note that this type of survey may alter the overall project timeline.	\$1,650
On rare occasions, a client desires the delivery of additional search-related services from the Baker Tilly executive search team. Services not included in the proposed scope of services include additional visits by the project team leader to your organization. Baker Tilly will bill Durant at an hourly rate of \$300 plus expenses for additional work requested explicitly by your organization outside this project's scope or as described in the proposed scope. Before beginning these services, Baker Tilly will prepare and submit a written explanation of the additional services requested and the estimated number of hours required before commencing any additional services.	\$300 per hour plus expenses

BAKER TILLY CAN PROVIDE OPTIONAL SERVICES

The City of Durant may benefit from the additional services we offer. All other services will be billed with the express consent and agreement of the City.

Negotiations

If selected, we will provide the City of Durant with our standard engagement terms. Should the City wish to provide alternate terms or proceed on the basis of its own format agreement, we would require the ability to negotiate mutually acceptable terms and conditions prior to executing a final contract.

Supporting Durant with our value-for-fees approach

We will provide the highest quality service for a fair and reasonable fee. Below is an overview of our value-for-fees approach and how it benefits you.

 A team that works with a similar client base and is ready to lead a smooth recruitment	 Frequent check-ins and timely responses to your inquiries	 Controlled costs through a service approach designed for your organization	 Knowledge retention through a commitment to staff continuity
 High level of experienced manager involvement for a successful recruitment	 Practical, flexible and collaborative approach designed for your unique needs	 Full range of service solutions to grow with your needs	 Use of innovative technology and software tools to support real-time communication and efficiencies

6. Providing recruitment services

Our relationship-driven approach is led by an engagement team who delivers a cost-effective, quality engagement for Durant. We will provide executive recruitment solutions that address the City's underlying complexities and your unique opportunities.

The Baker Tilly executive recruitment process

Task 1: Kickoff, marketing, recruitment and outreach

Our comprehensive recruitment process begins with developing a detailed marketing and recruitment brochure, which includes specific details outlined in the candidate profile, which we consider the most important first step in your recruitment process. The candidate profile provides important information such as required and desired education, professional certifications, professional experience, leadership traits and attributes, management style and related personal characteristics. These qualifications may serve as predictive indicators of the success of your next City Manager. The recruitment brochure will also include essential details about your city and local community and information that captures and conveys the essence of your organization.

Your recruitment will be national and inclusive in nature, with a candidate pool of diverse, experienced and talented individuals.

To launch the project, the engagement team leader will meet (on-site or virtually) with the City Council or designee to discuss your desired and required qualifications and coordinate stakeholder input upon the direction of the City Council. During this meeting, we also gather information on your strategic initiatives, goals and objectives, organizational culture, reporting structures and similar information. Additionally, we attempt to understand the overall scope and responsibilities of your next City Manager, including individual and organizational goals. We also try to understand the key issues, challenges and opportunities your City Manager will face. Additionally, we gather information about the total rewards (compensation and benefits) you offer for this position. [See example of a recruitment brochure in **Appendix C.**]

During this part of our process, the engagement team leader will work with the City Council or designee to reach a consensus on the leadership traits and management style you desire your next City Manager will bring to your organization. Additionally, we identify the qualifications, experience and education you want and require. We then use our proven strategies to identify other vital competencies and work values that many organizations would typically associate with individual success in similar positions nationwide.

Once we gather all the necessary information, we prepare a draft recruitment brochure for your review and approval. We then update the brochure, make your suggested edits or revisions, and launch your executive search. As you can see, the candidate profile is central to our strategy and outreach.

The project team will also work with the City to develop an advertising and marketing strategy to notify potential candidates about the vacancy and conduct an open recruitment that encourages applications from a talented and diverse pool of candidates.

Our team will place ads in appropriate professional publications, websites, and local print media, if required, and coordinate with staff to include information about the search on the City's social media platforms. Baker Tilly also has a high-traffic website with an exclusive location dedicated to encouraging

6. PROVIDING RECRUITMENT SERVICES

potential candidates to upload their resumes. The aggressive advertising and marketing campaign for top talent will include national, state, regional and local elements as determined during our initial meetings with the City's representatives. Our customized mailing list, selected from our extensive database and contacts collected at appropriate public-sector conferences, will be utilized to promote the City Manager position further.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Position profile and recruitment brochure development	• Onsite or virtual interview with the City • Baker Tilly will receive information regarding Durant's budgets, organizational charts, images, logos, etc. • Develop draft documents (recruitment brochure, advertisement, marketing letter and timeline)	2 weeks
Approve brochure, begin advertising and distribute marketing letter	• Brochure sent to the City for final approval • Begin advertising and distribution of recruitment brochure	2 weeks

Task 2: Execution of recruitment strategy and identification of quality candidates

Utilizing the information developed in Task 1, Baker Tilly will identify and reach out to individuals who will be outstanding candidates for the position of City Manager. Often, well-qualified candidates are not actively seeking new employment and will not necessarily respond to an advertisement. However, if a potential candidate is presented with the opportunity directly and properly, they may apply. We take pride in locating highly qualified candidates nationwide based on the professional contacts and relationships we have developed and maintained over many years.

As you direct, our exhaustive marketing, recruitment and outreach campaign includes a national, state, regional or local scope. Another essential factor that sets us apart from our competition is the ability to customize queries and search our extensive database of former applicants or former candidates in prior searches. Many of the individuals in our database have manifested interest in specific opportunities, organization size or geographic locations. This is an additional opportunity to identify a larger pool of potentially great applicants for your position.

We supplement our outreach by querying our customizable database, which includes information on recent and past applicants for similar positions. This allows the Baker Tilly team to customize applicant flow and track and communicate inquiries for candidates based on characteristics important to the City of Durant, such as geographic location, particular experience, expertise, and credentials.

While recruitment is underway, the engagement team will work with up to 10 subject matter specialists (SMS) who know what successful performance in the City Manager position looks like to reach a consensus on the ideal candidate's desired leadership and management style. We ask the SMS to complete a 30-minute online questionnaire. When aggregated, these responses generate a benchmark that prioritizes the critical competencies, work values and leadership and management style attributes for this position, creating a framework for assessing candidate fit with the City. Later in the process, finalists are asked to complete a companion questionnaire that allows us to match candidates' competencies, work values and leadership/management style to the benchmark. [See sample excerpt of TTI report in **Appendix D.**]

Each candidate submitting a resume is sent a timely acknowledgment by our team, including an approximate schedule for the recruitment. Throughout the recruitment process, communication is maintained with each candidate regarding information about the recruitment progress and their status. We take pride in the many complimentary comments made by candidates regarding the level of communication and the professional way they are treated during our recruitments.

6. PROVIDING RECRUITMENT SERVICES

PROJECT MILESTONE	DELIVERABLES	TIMELIN
Execution of recruitment strategy and candidate outreach	- Online data collection and profile development - Development of an interactive, searchable applicant database for the recruitment of your City Manager - Baker Tilly performs direct outreach to prospective candidates identified in the recruitment strategy - Utilization of an extensive applicant database to identify applications and review the applicant pool for competencies/demographics	4-5 weeks

Task 3: Screening of applicants and recommendation of semi-finalists

During Task 3, the project team screens each application and compares qualifications (education, experience, etc.) and responses to our customized supplemental questions to determine an overall match to your desired profile. This measure helps us review the overall accuracy and efficiency of our classification and review process. We will then narrow the list to 10 to 15 semifinalists for your review and identification of four or five finalists (often including an alternate) or the number of individuals you would like to interview and consider. The finalists will be selected based on written questionnaires, early due diligence information, consultant phone interviews, and recorded and one-way video interviews.

Another unique aspect of our recruitment process is using a web-based one-way video interview. Each finalist has limited time to answer each question, which each applicant sees for the first time when the interview begins. We do not provide questions in advance. Each finalist has 30 seconds to start their response and up to three minutes to respond to each question (usually three). This tool allows our team to understand better each candidate's ability to "think quickly." The one-way videos also allow us to evaluate the professional demeanor of each applicant. Our team will provide the City Council and others designated with a link to review.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Applicant screening and recommendation of semi-finalists	- Baker Tilly compares applications to the approved candidate profile developed in our searchable applicant database - Most promising applicants are asked to complete candidate questionnaires and provide due diligence information - Media, internet, and social media scan for information pertinent to future employment - Top candidates identified as semi-finalists - Semi-Finalist Report is prepared, including the brochure, applicant list, cover letter and resume of candidates to be considered - Baker Tilly and the City Council review video interviews - Project team leader meets with the City Council to review recommended semi-finalists - City Council selects finalists for on-site interviews - Finalists complete candidate management style assessment, responses are reviewed, and interview questions are developed	2-3 weeks

6. PROVIDING RECRUITMENT SERVICES

Task 4: Conducting background checks, reference checks and academic verifications

Once the City Council has identified a list of “Finalists,” Baker Tilly begins conducting reference checks, background report checks and academic verifications. We then prepare a Confidential Reference Report to complete our research and understanding of each applicant’s qualifications, management style, leadership traits or characteristics and professional work performance.

BACKGROUND CHECKS WILL INCLUDE INFORMATION FROM THE FOLLOWING AREAS:	
• Consumer credit	• Bankruptcy
• City/county – criminal	• State district Superior Court – criminal
• City/county – civil litigation	• State district Superior Court – civil litigation
• Judgment/tax lien	• Federal district - criminal
• Motor vehicle driving record	• Federal district – civil litigation
• Educational verification	• Sex offender registry

REFERENCE CHECKS, BACKGROUND RECORDS CHECKS AND ACADEMIC VERIFICATIONS

The City of Durant will receive a report that thoroughly verifies each finalist’s background.

To ensure the overall quality standards of our process, we require a minimum of 10-15 business days between the time you identify finalists for interviews and the time we can provide you with our Final Report.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Design final process with the City for on-site interviews with finalists	• Baker Tilly confirms interviews with candidates	1-2 days
Background checks, reference checks and academic verifications	• Baker Tilly completes background records checks, reference checks and academic verifications of finalists	2-3 weeks

Task 5: Final interview process

Upon completing Task 4, we will work with your City Council and designated staff to develop the final interview process. We customize the process according to your needs, desired outcomes, position functions, preferences, and directives. This may include steps that are important to you, our client. As such, the final interview process may consist of meetings with the department heads and, in collaboration with the City Clerk, the opportunity for a meet and greet with community members and individual tours of the City as directed by the City Council. Recognizing the impact of national, state or locally imposed restrictions in response to the COVID-19 pandemic, we work with your organization to adjust all aspects of our process as you deem necessary and appropriate.

Before the interviews, we provide documentation on each finalist, highlighting leadership and management profile (Gap Analysis) and a summary of our comprehensive/customized reference checks, background report checks and academic verifications. In addition, the Final Report will include guidelines for interviewing the candidates, suggested interview questions and an individual assessment tool for each member of your interview panel(s).

The engagement team leader will be available during the final interview process to answer questions about the candidates and, if requested, assist with the final evaluation of the candidates. If asked, we will help the City Council develop a compensation package and related employment considerations and assist with negotiating an employment agreement.

6. PROVIDING RECRUITMENT SERVICES

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Final Report prepared and delivered to the City	Final Report is prepared, including brochure, schedule, cover letter, resume, candidate questionnaire, suggested interview questions, candidate assessment form and management style probing questions	1 day
On-site interviews with finalists	- Schedule interviews and desired process - Recruitment project team leader attends client interviews and is available to participate during deliberations of candidates if requested	1-2 days
Offer made/accepted	- If requested, Baker Tilly participates in candidate employment agreement negotiations - Baker Tilly notifies candidates of the decision - Baker Tilly confirms the final process closeout items with Durant	1-2 days

Providing optional post-placement activities

A successful executive search creates an opportunity to solidify the leadership bond between Durant's elected officials and the new City Manager. We offer the following fee-based supplementary services to encourage growth and positive change.

SUPPLEMENTARY POST-PLACEMENT SERVICES	
Six-month check-in	A facilitated session allows the new City Manager and the City Council to discuss progress, goals and vision. It is usually structured as a half-day session and can form the basis for future performance evaluations.
Executive coaching	Coaching can help improve communication, leadership, prioritization, and other skills needed for peak performance. It also provides professional and personal counsel to a new manager.
Performance evaluation plan	An annual performance review process led by a third-party facilitator ensures valuable feedback, constructive dialogue, and agreement on priorities. It can also strengthen the council/manager relationship.
Management system review	A structured review of the organization's management system identifies ways to increase efficiency and effectiveness. It is especially helpful for new city managers because it provides an objective agenda for improvement.

We are happy to discuss these services with you and prepare a proposal for any desired services.

Recruiting a diverse candidate pool for the City of Durant

Baker Tilly's recruiting strategy for Durant reflects our firm's core values and commitment to diversity, inclusion, belonging and societal impact. Our work begins long before we start collaborating with you to find the right candidate for your City Manager position. We cultivate relationships with diverse networks of leaders who can bring new perspectives and experiences to the role.

6. PROVIDING RECRUITMENT SERVICES

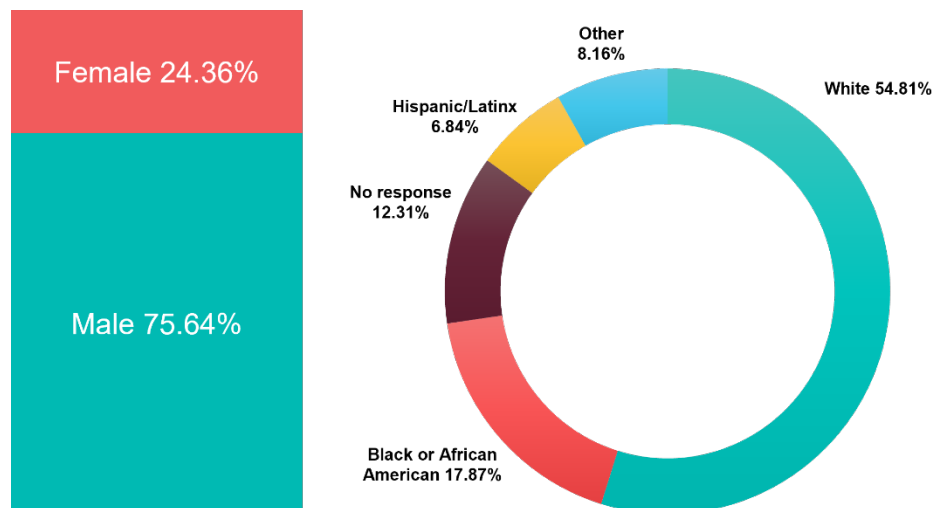
Our firm is a corporate member of the National Forum for Black Public Administrators (NFBPA) and the Local Government Hispanic Network. We serve on NFBPA's National Corporate Advisory Council and regularly participate in its membership events. As in every recruitment, we will call on our established networks to find candidates from a wide range of backgrounds, including those traditionally underrepresented in public sector hiring, and encourage them to consider Durant's opportunity. Based on our performance record, prospective candidates trust that the Baker Tilly executive recruitment team will fairly consider each application based on their qualifications and the established profile.

Baker Tilly is committed to ensuring equitable participation in our business and employment opportunities without regard to race, color, religion, sex, national origin, age, disability, veteran status, marital status, sexual orientation or any other legally protected status. As a leader in the executive recruitment industry, we take positive actions to prevent and remedy any discriminatory effects of business and employment practices.

Recruiting for diversity requires intentional and proactive efforts. These include:

- Advertising job postings that are inclusive and free from bias, using gender-neutral language and avoiding language that could discourage some populations from applying
- Reaching out to a wide range of communities and organizations and using various recruiting channels to help expand the slate of candidates
- Providing a welcoming and inclusive workplace culture within your city to attract and retain diverse talent

This past year, 88% of our applicants provided their race, and 87% shared their gender during the recruiting process. We saw a 1.97% increase in the number of Hispanic/Latinx applicants we presented to clients and a 2.28% increase in female applicants over the same timeframe in 2021. The demographic breakdown of 704 candidates presented was as follows:



DIVERSITY IN RECRUITMENT

As evidenced by positive trends in our applicant diversity data, we are committed to broadening the candidate pool for your position by reaching out to a wide range of communities, organizations and prospective candidates.

Triple Guarantee

We define the success of a smooth, seamless, effective, and responsive executive recruitment that culminates with the hiring of a highly qualified City Manager who matches the profile we developed to this end. We further define success by identifying and presenting an acceptable number of well-qualified applicants for the City Council to interview.

While we believe in the overall success of our process, we also recognize that unusual circumstances will invariably emerge. Therefore, we offer an industry-leading triple guarantee.

1. First, we commit to conducting your recruitment until you have selected a finalist and made an appointment for the fees and tasks quoted in this proposal. If you cannot reach an employment agreement with one of the individuals presented as finalists, Baker Tilly will identify and present a second supplemental group of qualified applicants to consider until you select a finalist.
2. Second, we guarantee your executive recruitment for 12 months against separation (voluntary or involuntary), which means that if you end the employment relationship (with or without cause) or the finalist resigns (for any reason), we will repeat the executive search at no additional professional fee but will include project-related expenses. *Please note that candidates appointed from within your organization do not qualify for this guarantee. Furthermore, this guarantee is subject to further limitations and restrictions of your state laws.*
3. Baker Tilly will not directly solicit any candidate selected under this agreement for any other position while the candidate remains in your employ.

7. Communicating with stakeholders

Ongoing, responsive communication is key to your recruitment's success, and we are committed to collaborating with all stakeholders throughout the engagement.

Committing to responsiveness and accessibility

Real-time communication and responsiveness are key to our relationship, and the City of Durant will work with dedicated engagement team members who will be available when you need us, where you need us, for as long as you need us. We will resolve your issues quickly and offer timely, forward-looking insights and advice to benefit your organization.

We will provide periodic communications to members of the City Council and others designated to keep them informed of our progress on the search. Much of the information generated during a recruitment is private data under local data practices laws; we work with your point of contact to keep everyone involved in the recruitment process informed about the confidentiality of candidate information. When your City Council selects finalists, we will create a media profile with public information about the finalists you can share with the media and members of the public if requested. If applicable, Baker Tilly may be able to advise the City on similar matters as it relates to candidate information sharing that may emerge during your search.

We believe that timely, effective and concise information is one of the most important components of any successful search. This can include weekly or biweekly communication with the City on the number of applicants received and the overall progress of the search. Equally as important is communication with all applicants, acknowledging receipt of applications immediately after submittal. Other communication essentials include inviting semi-finalists to complete due diligence, applicant questionnaire or one-way video interviews and providing applicants with sufficient time to complete process assignments by sharing important dates and deadlines. Furthermore, we provide direct access (via email or telephone) to all applicants in the event they have questions about any aspect of a search. Similarly, the City's project manager will have the engagement team leader's contact information to call, email or text the consultant on any aspect of the search. Our communications are always professional and respectful. We pride ourselves on delivering outstanding customer service and believe this is timely and essential to our collective success.

We take pride in acquiring clients that will serve as future references for our responsive service and we commit to providing ongoing communication and dialogue in a way that will support a transparent and trustworthy relationship into the future.

Phone calls

We respond to all telephone calls within 24 hours or the next business day.

E-mails or written questions

We are very responsive to emails or written questions, which are generally returned within 24 hours or the next business day.

Baker Tilly also manages and tracks applicant information and provides regular communications, updating the applicants on the recruitment status.

Stakeholder input

We believe stakeholder input is an important part of developing a profile for the City Manager position. The final decision for setting the parameters for the recruitment of a city manager must always rest with the city council, appointing authority or designee.

We also believe it is helpful to obtain input from the professional staff and a cross-section of citizens in the community in a structured way. Every community is unique, and because of this, we would provide suggestions. Still, most of all, listen to the council regarding what kind of process to utilize, whether scheduling a series of meetings with key community members, using an online survey and/or holding a public forum to gather input and ideas from citizens.

Baker Tilly has experience facilitating sessions to gather staff and community input. This input typically occurs during several aspects of the search, including developing a recruitment brochure, important questions from the community, interview questions, design and structure, and opportunities for the community to engage with the candidates, all requiring the prior approval of the City Council.

Development of the brochure typically includes meetings with council-identified stakeholders to learn about the desired leadership traits, management style, challenges, and opportunities the new city manager will have. If requested, we can also work with elected officials to identify strategic goals, objectives or performance goals for the new city manager. Several techniques can be used to receive community input, such as publicized community meetings, focus groups to ensure the participation of key stakeholders and an online survey that residents can complete.

Community engagement before the candidate interviews can be facilitated as a general meet-and-greet or community forum. Whether a general meet-and-greet or a more structured community forum is desired, it is important to recognize that events need to be structured to comply with local, state, and national laws, regulations and rules affecting hiring.

Ideally, we work with the city council to design desired stakeholder input, process design and interview questions, which we incorporate into the search process.

8. Workload for City Council and staff

Our ability to protect and enhance your impact begins with a strong, collaborative working relationship between the City of Durant and Baker Tilly.

Expectations and/or deliverables required of staff

Baker Tilly requests a commitment by the City Council, point of contact, or designee to meet with the recruitment engagement leader during the initial and subsequent visits. Council may designate a staff member as our primary point of contact throughout your recruitment. We will ask this person to arrange meetings and serve as the point of contact for progress reporting, provide the information needed for each recruitment, such as salary and benefits information, and respond to questions as needed. Also, as part of the interview process, we recommend that department heads be available to meet with finalists and that key personnel be available to assist in providing a tour of your community.

The council designee would be responsible for organizing the on-site interview process, but always with best practice suggestions provided by the recruitment engagement leader, if requested. As identified in **Section 5. Itemized schedule of costs** of this proposal, the City of Durant would be responsible for all travel-related expenses incurred by candidates for on-site interviews. It would not be the responsibility of Baker Tilly. This recruitment process is considered a turn-key process to identify qualified and outstanding city manager candidates. Any other responsibilities relating to Baker Tilly and the City, such as submittal of invoices, payment terms and all other anticipated interactions, are detailed in various sections of this proposal.

Our process is designed to keep the following in mind:

- Comprehensive process incorporates the active participation of the City Council at critical steps.
- Keep decision-makers fully advised and informed of all aspects of the process without requiring them to expend substantial time or put aside other pressing issues.
- City staff can focus on their primary and assigned functions while Baker Tilly manages the search process.

9. Proposed timeline

The City of Durant can expect a genuine, meaningful relationship with Baker Tilly. We will meet your deadlines, provide quality executive recruitment services and deliver a well-planned, seamless experience.

Meeting your deadlines and budget

Our team has the ability and availability to complete this project to present candidates for the city manager position on time and within budget. We use a dynamic scheduling tool that ensures your project is staffed with the proper personnel. If we are awarded this project, the personnel listed in this proposal will be scheduled to meet the timelines requested by the city council. To ensure your objectives are met and to assist team members in managing their commitments, Baker Tilly employs the following scheduling and planning strategies and tools:

- **Dedicated teams with clearly defined roles and responsibilities.** The proposed team is structured to assure the city council that we can escalate any issues quickly, be available to you when you need us and meet your needs creatively without overburdening individual team members.
- **Staff scheduling tools and resources.** Using weekly availability reports, dedicated resource management coordinators help ensure our professionals' commitments do not exceed their capacity to deliver high-quality services for the city manager recruitment.
- **Flexible staffing ratios depending on project needs, including a high ratio of dedicated partner and manager resources.** We work to balance workloads for individuals via advance planning and integrate additional subject-matter specialists and support staff where appropriate.

Our specialized executive recruitment practice always has current projects of varying stages in progress. We meet all of our clients' deadlines and needs through a scheduling process that matches the experience required for a particular project with the team members best suited to provide quality services.

With 10 professionals dedicated to public sector executive recruitments, the proposed project team can cost-effectively access the breadth and depth of skills you need to meet your objectives, however much support you may require. Our deep bench of experienced consultants enables us to assign additional specialized consulting staff as needed to support the execution of project deliverables.

We are confident that, based on our existing schedules, commitments to clients and absolute adherence to our internal standards of service delivery, quality, integrity, efficiency, responsiveness and results, the proposed project team leader will be available to begin your executive recruitment on short notice. Typically, we can launch a recruitment within 10 days of receiving an official notice to proceed. We often complete a recruitment in 90-120 days, depending on the availability of information we may need to meet our mutually agreed-upon schedule.

Co-developing a timeline to meet Durant's deadlines

A typical timeline is 90-120 days from project kickoff to extending an offer of employment. The Baker Tilly project team leader will discuss your anticipated or desired timeline during the initial kickoff meeting. We intend to conduct your recruitment expeditiously, but not at the expense of finding qualified applicants to present to you. For this proposal, target dates are to be determined. Once you approve, and based on mutual agreement, we will provide actual dates in our service agreement. The following is an example of a timeline for an executive recruitment process.

9. PROPOSED TIMELINE

PROJECT MILESTONE	DELIVERABLES
Profile development, advertising, and candidate outreach	• Baker Tilly completes on-site interviews to develop a candidate profile and recruitment brochure; City approves the ad placement schedule and timeline • Baker Tilly sends a draft recruitment brochure to the City • The City returns the draft brochure (with edits) to Baker Tilly • Baker Tilly launches marketing, recruitment, and outreach campaign • Online data collection and profile development
Applicant screening and assessment and recommendation of semi-finalists	• Baker Tilly commences formal review of applications, most promising candidates complete questionnaires • Candidates complete recorded interviews online • Baker Tilly completes a formal review of applications and sends selected resumes to the City Council for review • Candidates' recorded interviews are presented • Baker Tilly meets with the City Council and recommends semi-finalists; City Council selects finalists for on-site interviews • Finalists complete candidate management style assessment, responses are reviewed, and interview questions are developed
Comprehensive background checks, academic verifications and reference checks	• Baker Tilly completes reference checks/background checks/academic verification on finalists
On-site Interviews with finalists	• Baker Tilly sends documentation for finalists to the City Council • The City Council conducts on-site interviews with finalists
Employment offer made/accepted	• The City Council extends employment offer to selected candidate

COMMITMENT TO SUCCESSFULLY DELIVER RECRUITMENT SERVICES TO MEET YOUR REQUIREMENTS

The City of Durant's time is valuable. We will co-develop a timeline to provide the City's executive recruitment services on time.

Appendix A: Prioritizing diversity, inclusion, belonging and societal impact (DIBS)

Prioritizing diversity, inclusion, belonging and societal impact (DIBS)



**MEET SHANE LLOYD,
DIBS STRATEGY LEADER**

In his role as head of diversity, inclusion, belonging and societal impact at Baker Tilly, Shane oversees our company's DIBS initiatives and serves on influential national diversity and inclusion boards.

At Baker Tilly, DIBS is who we are rather than simply what we do. We celebrate and value the identities, perspectives and contributions of every person. As we empower our team members to grow and bring their talents to the table, we discover opportunities to achieve better results for the City of Durant. We hire people who bring new perspectives and experiences, including Shane Lloyd, who joined Baker Tilly as our DIBS strategy leader in 2021.

Baker Tilly's DIBS steering committee is designed to strengthen our firm's culture of diversity, inclusion and belonging. This cross-section of leaders across our firm oversees our strategy — from inclusion-related communications to accountability measures for our key diversity goals and coordination of our DIBS ecosystem.

Our new, ambitious goals center around our structural pillars of diversity, inclusion, belonging and societal impact — embedding this work ever more deeply into the day-to-day working of our business. Our DIBS ecosystem includes an array of groups, initiatives and deep networks of committed team members. [Learn more here.](#)

Growth and Retention of Women (GROW)



Through our GROW initiative, Baker Tilly provides women valuable opportunities to network, acquire skills, strengthen professional relationships and advance in their careers. Our commitment to GROW increases the number of women in management positions and enhances the retention of women at all firm levels.

Supporting Opportunity, Advancement and Recognition (SOAR)



SOAR focuses on improving inclusion and increasing retention of team members of color to create a more inclusive, innovative and productive workforce. Within SOAR, our team member-led Black, Latinx and Asian American and Pacific Islander (AAPI) communities provide spaces for conversation, relationship-building and engagement.

NexGen: Joining workforce generations



With NexGen, we aim to empower the next generation of team members to collaboratively engage in our firm's progress while promoting an overall investment in our future.

PRIDE team member network



Our PRIDE team member network exists to support the LGBTQ+ community and their allies within Baker Tilly. We strive to create an open environment centered on LGBTQ+ issues and topics relevant to the workplace.

Baker Tilly Foundation



As a firm, we have made our position clear: We stand against racism and discrimination in any form. Our Baker Tilly Foundation supports causes within key pillars, including human services organizations that advance well-being, equity and inclusion.

Appendix B: Engagement team member resumes

DIRECTOR**Edward G. Williams, Ph.D.**

Edward Williams, a director with Baker Tilly, brings character, competence, and expertise to every project.

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Education

Bachelor of Arts, education
University of Missouri
(Kansas City, Missouri)

Master of Higher Education
Administration
University of Missouri
(Kansas City, Missouri)

Ph.D., Educational Leadership and
Policy Analysis
University of Missouri
(Kansas City, Missouri)

Languages

English
Spanish

Edward has more than 20 years of collective experience in human resources and organizational development at various levels and disciplines, including state and local government, not-for-profit and educational institutions.

Specific experience

- Human resources executive (municipal and state government)
- Executive recruitment, employee development, benefits administration, strategic planning, Performance management, market compensation studies, workforce planning, recognition programs and process improvement

Industry involvement

- Society for Human Resources (SHRM)
- Institute for Management Studies (IMS), advisory board
- Texas Municipal Human Resources Administration (TMHRA)

Community involvement

- Ft. Bend Habitat for Humanity, president, vice-president, secretary and member, board of (2014-2019)
- AAU basketball coach – middle school boys

Continuing professional education

- Institute for Management Studies - Houston
- International Personnel Management Association

DIRECTOR

Art Davis

Art Davis, a director with Baker Tilly, has pursued his passion for improving local government and creating great communities for more than 30 years.



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Education

Bachelor of Arts in political science
and public administration
William Jewell College
(Liberty, Missouri)

Master of Public Administration
University of Kansas
(Lawrence, Kansas)

Art specializes in providing executive recruitment and organizational management consulting services for cities, counties, and not-for-profits.

Specific experience

- Successfully launched and expanded his own local government consulting firm over the course of 10 years
- More than 18 years of experience in executive recruitment
- Community leadership program facilitation
- Leadership and management development
- Strategic goal setting and strategic planning facilitation
- Organizational assessment, design and development
- Organization and community facilitation
- Served more than six years as associate director for the Civic Council of Greater Kansas City, a nonprofit, 501c4 membership organization comprised of CEOs representing some of the largest companies in the region
- Coordinated and organized a strategic and master planning process (and an update of the plan after four years) focused on re-developing downtown Kansas City, involving hundreds of stakeholders
- Served nearly six years as city administrator for Lee's Summit, Missouri and in other local government positions in Kansas
- Served as assistant to the Mayor of Dallas, Texas
- Led and participated in a wide variety of community initiatives; served on a major hospital board for 13 years and on other not-for-profit boards
- Presented with the L.P. Cookingham Award by the Greater Kansas City Chapter of the American Society for Public Administration, recognizing his long-term and outstanding contributions to the field of public administration

Industry involvement

- International City/County Management (ICMA), member since 1984

DIRECTOR

Patricia Heminover

Patty Heminover, a director with Baker Tilly, has more than 20 years of experience in local government.



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Education

Bachelor of Science, consumer science, business administration
Minnesota State University – Mankato

Mini MBA program, human resources management
University of Saint Thomas (Saint Paul, Minnesota)

Master of Education, administration
Minnesota State University – Mankato

Patty has been with the firm since 2010. Before joining Baker Tilly, she was a superintendent, assistant superintendent, director of human resources and director of finance. She brings considerable experience identifying management talent, leading organizational and process improvements, and developing and administering budgets.

Specific experience

- Executive Recruitment, employee development, benefits administration, strategic planning, performance management, market compensation studies, workforce planning, recognition programs and process improvement
- Experience identifying management talent, leading organization and process improvements, and developing and administering budgets
- Understanding of human resources and finance
- Experience working with governing boards
- Served as superintendent, co-superintendent of schools, director of human resources and finance, and director of human resources and business services for two Minnesota school districts
- Facilitated discussions with legislators at the state level regarding education funding, securing new funding for a Minnesota school district

Industry involvement

- Minnesota Association of School Administrators (MASA)
- American Association of School Administrators (AASA)
- Minnesota Association of School Business Officials (MASBO)
- River Heights Chamber of Commerce, member
- State Negotiators Association, Minnesota School Board Association
- Patty has received a School Finance Award, technology leadership awards and helped establish the first K-12 International Baccalaureate School District in Minnesota

Continuing professional education

- Human Resource Certificate, University of St. Thomas
- Superintendents Licensure, State of Minnesota

MANAGING DIRECTOR

Nancy Hetrick

Nancy Hetrick is a managing director with Baker Tilly's public sector advisory practice.



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Education

Bachelor of Arts in political
science, public administration
concentration
California State University, Chico

Nancy is an experienced facilitator with expertise in strategic planning, team building and facilitating problem-solving and process improvement initiatives. In addition, she is skilled in performance management, succession planning, organizational and process improvement, and budget development.

Nancy led the County of San Mateo's Outcome-Based Management program and has supported local government clients with designing and implementing performance measurement systems. Nancy is an excellent facilitator and trainer. She has developed a curriculum, conducted training on various topics, and routinely facilitates priority-setting and teambuilding workshops for cities, counties and not-for-profit boards.

She is certified to administer the Myers-Briggs Type Indicator assessment instrument. Since 2006, she has led projects with local governments, including the Bay Area cities of Rohnert Park, Redwood City, San Carlos, Fairfax, Orinda, Merced, Martinez, San Jose and Santa Cruz; the Sacramento Area Council of Governments; the Peninsula Library Partnership; and the Bay Area Counties of Alameda, San Mateo, Marin, Monterey and Santa Clara.

Specific experience

- Local government professional with more than 25 years of local government and consulting experience
- Completed hundreds of consulting engagements for local government clients, including in the areas of strategic planning, organization design, workforce and succession planning, performance management, and all forms of teambuilding
- Seasoned facilitator with expertise in team building, strategic planning and governance engagements for both appointed and elected teams
- Oversaw budget and administrative activities of the criminal justice departments and led San Mateo County's Outcome-Based Management program on behalf of County leadership
- Certified in administering the Myers-Briggs Type Indicator (MBTI), DiSC, and other assessment tools

Industry involvement

- Municipal Management Association of Northern California (MMANC)
- Cal-ICMA, Talent Development Team

DIRECTOR

Yolanda Howze, M.P.A., IPMA-SCP, SPHR, SHRM-SCP

Yolanda Howze, a director with Baker Tilly, brings more than 25 years of public sector experience, including 20 years as a multifaceted and competent human resources leader.



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Education

Dual Bachelor of Arts in
psychology and organizational
leadership
Maryville University
(St. Louis, Missouri)

Master of Arts in public
administration and policy analysis
Southern Illinois University
Edwardsville (SIUE)

Yolanda is a well-regarded, award-winning human resources professional with more than 20 years of public sector human resources experience, primarily in municipal government.

Having worked in the public sector for more than 25 years, Yolanda is passionate about her craft and being of service to others, which, in addition to her employment experience, she has demonstrated through professional conference presentations/speaking events and serving on local and regional boards and committees including IPMA-HR, as well as other community involvement.

Specific experience

- Human capital professional and administrator executive
- Executive recruitment, total rewards and classification administration, performance management, project management, HRIS and process improvement, change management, labor relations, emergency management and disaster recovery, training and organizational development and safety and risk management

Industry involvement

- International Public Management Association - Human Resources (IPMA-HR)
- Society for Human Resource Management (SHRM)
- Texas Municipal Human Resources Association (TMHRA)
- IPMA-HR Texas Chapter, (former) Conference Program Committee
- IPMA-HR Central Region, (former) vice president ('10)
- IPMA-HR Central Region, (former) Secretary - treasurer ('09-'10)
- IPMA-HR Greater St. Louis Chapter, (former) president

Continuing professional education

- International Public Management Association-Human Resources (IPMA-HR)
- IPMA-HR Greater St. Louis Chapter
- Human Resources Certification Institute (HRCI)
- Society for Human Resources (SHRM) certified professional

MANAGING DIRECTOR

Anne Lewis

Anne Lewis leads Baker Tilly's public sector executive recruitment team and brings nearly 20 years of local management experience.



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Education

Bachelor of Science, business
administration and management
Shenandoah University
(Winchester, Virginia)

Master of Science, organizational
leadership and public
administration
Shenandoah University
(Winchester, Virginia)

Before joining Baker Tilly, Anne served as an assistant county administrator for a Virginia county, a deputy city manager and an assistant city manager for two Virginia cities. Over the last 17 years, her experience in local government has also included positions as an emergency management deputy director, public information officer, human resources manager, parking authority executive director, housing director, transit director and convention and visitor's bureau executive director. She also has had responsibility for parks, recreation and community services, information technology, animal services, general services and legislative programs.

Industry involvement

- International City/County Management Association, Credentialed Manager (ICMA)
 - Taskforce on recruitment guidelines handbook
 - Taskforce on women in the profession
 - Taskforce on internship guidelines
- Government Finance Officers Association (GFOA)
- Virginia Local Government Management Association (VLGMA), former member of executive board
- Virginia Women Leading Government
- National Public Employer Labor Relations Association (NPELRA)

Community involvement

- Shenandoah University Alumni Association, executive committee
- Shenandoah Apple Blossom Festival®, board of directors

Continuing professional education

- Graduate Certificate in Public Management
- Senior Executive Institute and LEAD graduate, The Weldon Cooper Center, University of Virginia

SENIOR RECRUITMENT ANALYST

Karen Edwards, SHRM-CP

Karen Edwards, a senior recruitment analyst with Baker Tilly, has been with the firm since 2021.



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Education

Bachelor of Science in business
administration - human resource
management
Western Governors University

Karen is a senior recruitment analyst with Baker Tilly's executive recruitment practice group. Her responsibilities include assisting in the coordination of executive recruitments. Karen manages outreach, generates reports, conducts detailed background checks and analyzes data to ensure the success of all engagements.

Specific experience

- More than 30 years of experience in human resources, administrative positions and customer service
- Proficient in analyzing data, creating and implementing standard operating procedures and preparing presentations and reports
- Adept at identifying inefficiencies to enhance organizational performance and streamlining office operations
- History of success adapting in dynamic environments to effectively manage multiple projects simultaneously

Continuing professional education

- Society for Human Resources (SHRM) certified professional

MANAGER

Michelle Lopez

Michelle Lopez, a manager with Baker Tilly, has been with the firm since 2017.



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Education

Associate in Arts, liberal arts
Minneapolis Community College
(Minneapolis, Minnesota)

Bachelor of Science, project
management (in progress)
Colorado State University – Global
Campus

Michelle assists in the organizational management of the executive recruitment process. Her primary focus is to ensure that the recruitment process runs smoothly from start to finish by collaborating closely with internal team members, clients, and candidates. Michelle is responsible for coordinating the workflow of the recruitment process, establishing timelines, and monitoring progress. She is also responsible for managing communication channels, ensuring that everyone involved is informed of key developments and updates.

Specific experience

- More than 10 years of administrative support experience for multiple departments, including human resources and marketing
- Four years of experience in information technology help desk and support
- Survey and data reporting
- Reference checks for potential candidates
- Interview coordination and scheduling
- Recruitment marketing research and organization

RECRUITMENT ANALYST

Diane Segulia

Diane Segulia, a recruitment analyst with Baker Tilly, has been with the firm since 2015.



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Education

University of Minnesota – partial
credits (Minneapolis, Minnesota)

Diane is a recruitment analyst with Baker Tilly's executive recruitment practice group. Her responsibilities include conducting research for the consultants, completing background checks, coordinating information and resources, and collaborating with candidates and clients through all phases of an executive recruitment.

Specific experience

- More than 10 years of administrative support experience in public sector and private sector organizations
- Compiling and organizing candidate materials
- Coordinating with candidates throughout the recruitment process
- Conducting reference checks for potential candidates
- Coordinating and scheduling interviews
- Recruitment marketing research and organization

Carrie Thompson

Carrie Thompson, a recruitment analyst with Baker Tilly, has been with the firm since 2021.



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Education

Bachelor of Arts in communication
with a concentration in media
production and criticism
George Mason University

Carrie facilitates smooth sailing during the recruitment process. She runs reports, coordinates outreach and organizes important documents. Along with her work behind the scenes, she collaborates with clients and candidates to help them on their journey to success.

Specific experience

- More than 15 years of customer service experience in multiple industries
- More than four years of experience in recruiting coordination, including interview scheduling and candidate communication
- Expertise in marketing and position advertising via LinkedIn
- Reference and extensive background checks for potential candidates

Community involvement

- Mission trip volunteer with Herndon United Methodist Church

Appendix C: Sample brochure

THE CITY OF PARIS, TEXAS

SEEKS ITS NEXT...

CITY MANAGER



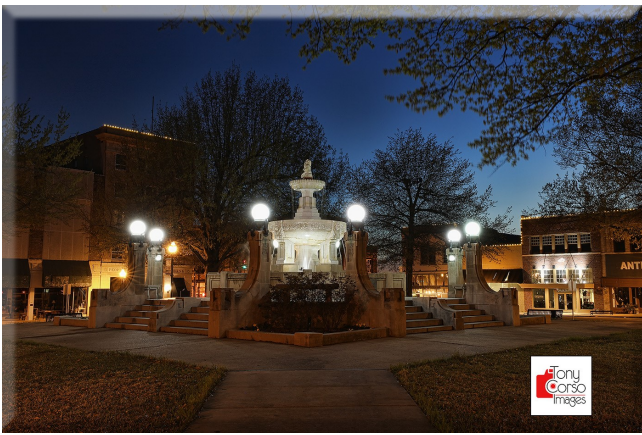
THE COMMUNITY

The City of Paris, named the "Best Small Town in Texas" by Kevin Heubusch in his book *The New Rating Guide to Life in America's Small Cities*, is the county seat and principal commercial center of Lamar County, located at the intersection of US Highways 271 and 82 approximately 100 miles northeast of Dallas near the Red River. This diverse community has an estimated population of 25,171 (2010 Census Data). Lamar County is in Northeast Texas and borders the State of Oklahoma. As the largest city in the area, Paris serves as the retail, recreational and medical hub of the region. As a regional medical center, Paris serves patients in Northeast Texas and Southeast Oklahoma. Founded in 1911 as St. Joseph's Hospital, Paris Regional Medical Center is a 154-bed medical center. It complements the large number of doctors and dentists that provide a wide range of general and specialized medical services to residents.

A strong economic development asset for Paris is its robust utility capacity. The City provides utilities through its 36 Million Gallons per Day (MGD) water plant and 7.25 MGD wastewater plant. Texas Utilities (TXU) supplies electric power to Paris via its interconnected transmission system with a generating capacity of 22,808,000 KW. The supply of electric power is adequate to meet the requirements of any commercial or industrial demand. Atmos Energy provides natural gas for residential, commercial, and industrial users.

Chisum Independent School District, North Lamar Independent School District and Paris Independent School District provide educational services to City of Paris community. Each of the districts are accredited by the Texas Education Agency. Paris Junior College inside the city limits, and Texas A&M University within easy commuting distance, provide higher education services to the community.





PARTIAL LIST OF DUTIES

1. Approves the appointment and removal of all City employees except those who report directly to the City Council;
2. Prepares and submits an annual budget to the City Council for approval, then administers the approved budget after adoption;
3. Prepares and submits annual reports to the City Council on the finances, accomplishments, and activities of the City for the previous fiscal year;
4. Ensures that the City Council is aware of the City's financial condition, City needs, and recommends adjustments as circumstances require;
5. Actively pursues economic development activities for the City consistent with the organizational vision, and values;
6. Ensures compliance with federal, state, and local laws as they apply to the City;
7. Directs, outlines and coordinates the activities of all the City departments to ensure alignment with City Council objectives and goals;
8. Supervise nine (9) department directors, who are responsible for supervising 23 operational areas;
9. Implements the duties, within the framework of general policy administration, established by the City Council with wide latitude of action in planning and directing municipal functions. The City Council reviews the City Manager's work through periodic evaluations, review or feedback;
10. Interacts with the public as a spokesperson and ambassador for the City;
11. Performs other duties as prescribed by the City Charter or directed by the City Council.

ABOUT THE CITY MANAGER

The City of Paris operates under the council/manager form of government. Consistent with this structure, citizens elect seven City Council members. Following an election, the City Council selects a Mayor and Mayor Pro-Tem from its members. The City Council then hires a City Manager to direct the operations of the City. The City Manager is the chief administrative officer, and is responsible for implementing the council-established goals, priorities, policies and initiatives. The City Manager also ensures the financial transparency, accuracy and integrity of the City, while representing the best interests of the residents, implementing City Council adopted policies, and supporting the City Council's stated strategies for advancing the community. The City's General Fund Budget for Fiscal Year 2019-2020 is \$23.6 million, and the Water & Sewer Fund Budget is \$15.1 million. Total staffing includes 331 full-time equivalents. Paris voters have adopted a 4-A sales tax (one-quarter cent) earmarked for economic development and administered by the City Council-appointed Paris Economic Development Corporation. A recent success is the recruitment of American SpiralWeld Pipe Company, currently under construction.

The City of Paris seeks a visionary, progressive, dynamic, approachable and politically astute City Manager, whose experience and expertise includes infrastructure management; strategic planning; utilities coordination and oversight; budget preparation, monitoring and administration; financial reporting; economic development; organizational branding and marketing; and community engagement. The selected candidate will offer skills, traits, and attributes consistent with, but not limited to, the following:

- A contagious passion for effective service delivery, effectiveness, efficiency, and responsiveness in managing the day-to-day operations of the City and the delivery of services to the community;
- An open, honest, confident and approachable professional, who communicates effectively, both in oral and written forms, and who equitably communicates with members of the City Council, employees, businesses, private and public entities, and residents in a respectful and productive manner;
- An employee engagement and recognition champion who inspires staff, models excellence, supports employee and organizational development, and is transparent, honest, approachable, collaborative, and "walks the talk."
- An adept team builder and team leader, who is able to maintain, and when necessary, repair relationships with the constituency in a cooperative and respectful manner, acknowledging and respecting the community and organizational traditions, while demonstrating a commitment to moving the City forward in a positive and progressive manner;
- A proven track record of procuring and effectively managing specialized resources to continuously improve service delivery in areas such as wastewater management and service delivery efficiencies;
- Proficiency in managing all matters concerning municipal government and intergovernmental cooperation.

THE COMMUNITY *(continued...)*

Visitors may be attracted to the area by water activities on Lake Crook or the Pat Mayse Reservoir. The Pat Mayse Reservoir is located 15 minutes from the City of Paris, Texas and provides 6,000 acres for boating, fishing, and camping. The Gambill Goose Refuge and numerous hunting and fishing areas are also located in the County. Other points of interest and activities include the Love Civic Center, Sam Bell Maxey House, the A.M. Aikin Archives, Red River Valley Exposition, and the Lamar County Historical Society Museum. Recreational amenities include one 18-hole golf course, a public swimming pool, 26 tennis courts, Trail de Paris, a sports complex, and 24 public park areas. Also popular is the Municipal Band which has a series of outdoor concerts in the summer.

Following a tradition of American cities named "Paris," the local B&W plant gifted the 65-foot replica of the Eiffel Tower of Paris, in 1993. The City installed the tower on the Love Civic Center grounds, near Paris Junior College. In 1998, the City approved the placing of a giant red cowboy hat on top of the tower to raise its elevation. In short, Paris is an attractive place to live, work and play, and offers a great opportunity to its next City Manager, to continue improving the life and community as a whole.



CHALLENGES AND OPPORTUNITES FOR THE NEW CITY MANAGER

The City Council has established the following goals and opportunities for the new City Manager:

- **Economic Development** – The City Manager will work closely with the Paris Economic Development Corporation, the Paris Chamber of Commerce, the school districts, Lamar County, and Paris Junior College and other economic development partners to position Paris for tax base expansion and diversification, job growth and development of additional community amenities.
- **Code Enforcement** – The City Council has established Code Enforcement and community beautification as high priorities and will expect the City Manager to marshal City and external resources to address litter, dilapidated structures, high grass and weeds, sign violations and other nuisance abatement initiatives.
- **Streets and Roads** – The City Manager will place a priority on addressing deteriorating and/or substandard roadways and streets, making recommendations to the City Council in a timely manner and effectively administering approved funds. The City Manager will build and maintain a positive relationship with TXDOT to address state highways running through the City.
- **Organizational Assessment and Alignment** – The new City Manager will assess the organizational structure of the municipal organization to include senior staffing, interdepartmental relationships, and adherence to the strategic plan and related goals and objectives. The Manager will ensure that highly talented and effective directors are in place for each of the City's operating departments and divisions.
- **Human Resources and Internal Organizational Climate** – The new City Manager will evaluate the organizational climate for staff and ensure that policies and procedures are in place and enforced to provide a positive and results- oriented environment, recognizing respect for and dignity of all employees, regardless of level within the City.
- **External Relationships** – The City Manager will maintain positive and productive relationships with other cities, Lamar County, the Paris Economic Development Corporation, the Council of Governments, State of Texas and the community at large.
- **Wastewater Treat Plant Upgrade** – The City's current wastewater treatment plant is nearing the end of its design life and the City will be required to design, fund and construct a new facility in the future.

QUALIFICATIONS AND EXPERIENCE:

A Bachelor's degree from an accredited college or university in public administration, engineering, business administration, finance, marketing, or a closely related field, and a minimum of five (5) years related management experience in a comparable or larger community is required. Management experience in a non-urban environment would be beneficial. A Master's degree in Public Administration, and Certification as a Credentialed Manager by the International City/County Management Association (ICMA) is preferred but not required. The Paris City Council may consider a combination of education and related management experience to meet the basic requirements of this position.

COMPENSATION AND BENEFITS

The City of Paris offers a market-competitive total rewards package, which includes a base salary of the mid to high \$100K range. Additionally, the City offers an outstanding medical, dental, vision and life insurance package, and participation in the Texas Municipal Retirement System. The City Manager may also elect to participate in the voluntary ICMA-RC Retirement Program. The City will negotiate a vehicle allowance, employment agreement and relocation assistance with the successful finalist. The City of Paris requires residency of its City Manager within the corporate limits within six months of selection.

APPLICATION AND SELECTION PROCESS

Qualified candidates must complete our online application and submit a cover letter and professional resume. Visit our website: <https://bakertilly.recruitmenthome.com/postings/2443>. This position will remain posted until filled. First review of applications will be on **Monday, December 2, 2019**. Following the application deadline, we will screen all applications against the desired qualifications outlined in this brochure. The City of Paris may extend invitations to a face-to-face interview in Paris, Texas to those candidates identified as finalists, after Baker Tilly completes reference, academic and related background checks; and, with the prior authorization from each applicant.



Visit the City of Paris's
website www.paristexas.gov
for more information.

For more information about this position, please contact:

Edward Williams
Edward.Williams@bakertilly.com
214.842.2436

Chuck Rohre
Chuck.Rohre@bakertilly.com
214.466.2436

*The City of Paris is an Equal Opportunity Employer and values diversity
at all level of its workforce!*



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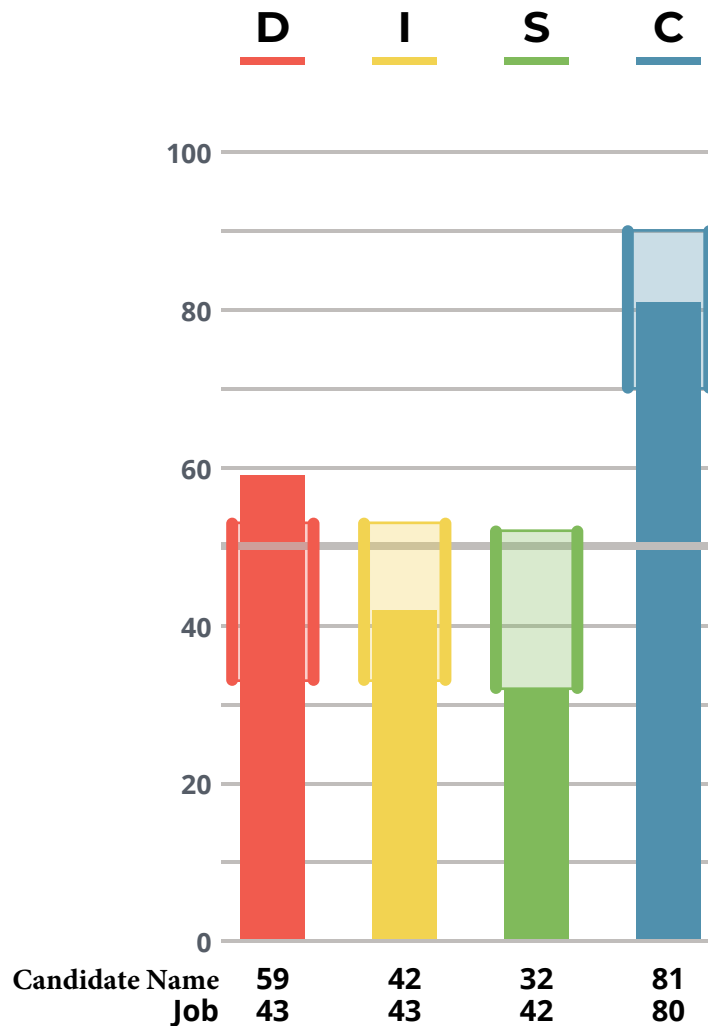
Appendix D: Sample TTI report

Workplace Behaviors®



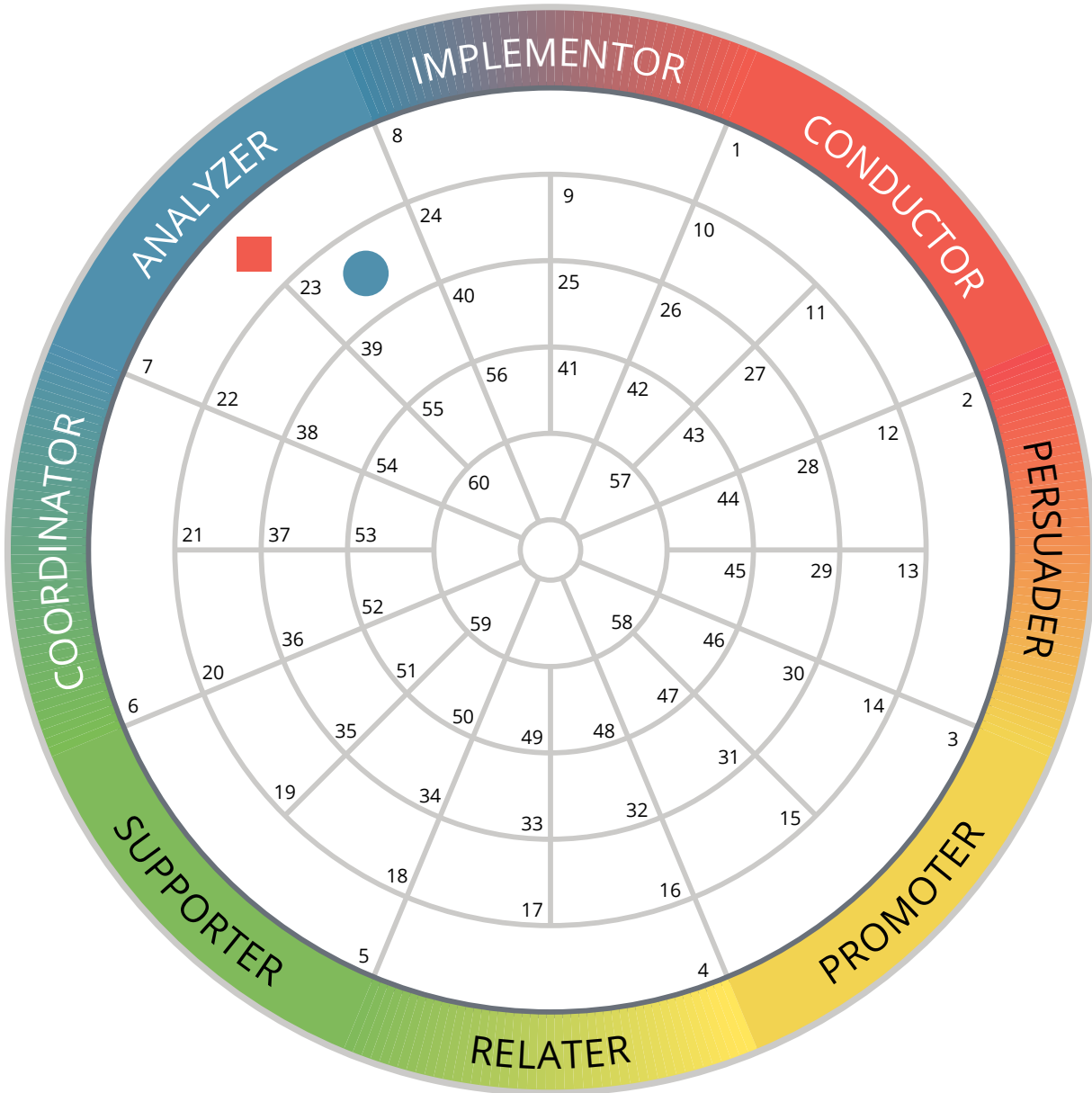
Candidate Name

The following graph is designed as a visual comparison between the position and the applicant for each behavioral factor. The highlighted area denotes the position-related score for each behavioral factor. The applicant's score is denoted by the darker red, yellow, green and blue line. The closer the applicant's score aligns to the position's score, the better the applicant will perform in the position with respect to behavior.



Job Range (20 point range)

The Success Insights® Wheel



Job - (7) ANALYZER

Candidate Name - (23) IMPLEMENTING ANALYZER

Comparison Analysis

For Consulting And Coaching



Job Competencies Hierarchy	Zone Range	Person
1. Time and Priority Management	79 — 100	62 
2. Self Starting	87 — 100	61 
3. Decision Making	94 — 100	88 
4. Personal Accountability	85 — 100	58 
5. Diplomacy	72 — 100	66 
6. Teamwork	74 — 100	67 
7. Project Management	82 — 100	69 

Primary Driving Forces Cluster	Zone Range	Person
1. Collaborative	58 — 100	46 
2. Harmonious	36 — 58	24 
3. Altruistic	35 — 59	21 
4. Structured	36 — 58	46 

Job Behavioral Hierarchy	Zone Range	Person
1. Organized Workplace	81 — 100	85 
2. Analysis	54 — 80	80 
3. Persistence	62 — 80	65 
4. Following Policy	61 — 80	70 

 Exact match
  Fair compatibility
  Good compatibility
  Poor compatibility
  Over-focused

Candidate Name