

EXHIBIT 11-A



**BOB MURRAY
& ASSOCIATES**

Experts In Executive Search

A Proposal to Conduct an Executive Recruitment

for the Position of

ASSISTANT GENERAL MANAGER

on behalf of the



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

October 2, 2024

Mr. David Stoldt
General Manager
Monterey Peninsula Water Management District
5 Harris Ct Building G
Monterey, CA 93940

Submitted via email to: simona@mpwmd.net

Dear Mr. Stoldt:

Bob Murray & Associates is pleased to submit a proposal to conduct the Assistant General Manager recruitment for the Monterey Peninsula Water Management District. The following details our qualifications and describes our systematic—yet flexible—method of identifying, recruiting, and screening outstanding candidates on your behalf. It also includes a proposed budget, timeline, and guarantee.

At Bob Murray & Associates, we pride ourselves on providing quality service to local governments, non-profit agencies, and private firms. Our recruitment process helps you to determine the direction of the search and the types of candidates you seek while capitalizing on our decades of experience and vast network of contacts to reach those candidates. Our expertise ensures that the candidates we present to the Monterey Peninsula Water Management District will match the criteria you have established, be a positive placement for your organization, and be outstanding in their field.

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

2024

Glenn-Colusa Irrigation District, CA (General Manager)
West Basin Municipal Water District, CA (Assistant General Manager) (limited scope)
Western Placer Waste Management Authority, CA (General Manager)

2023

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

2022

Azusa, CA (General Manager, Light & Water)
Las Gallinas Valley Sanitary District, CA (General Manager)
Monterey County Water Resources Agency, CA (General Manager)
Oakdale Irrigation District, CA (General Manager)
San Francisco, PUC (Assistant General Manager and CFO)
Tamalpais Community Services District, CA (General Manager)
Town of Discovery Bay Community Services District, CA (Assistant General Manager)
West Basin Municipal Water District, CA (General Manager)

We work as a team on every search at Bob Murray & Associates. Your Project Lead would be Adele Fresé, Stacey Stevenson, or Jon Lewis, who would not only direct and supervise the project team from beginning to end but also serve as the Recruiter for the project as well.

To learn first-hand of the quality of our services and why the majority of our engagements come from repeat and referred clients, we invite you to contact the references listed on page 12 of the attached proposal.

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

Sincerely,

A handwritten signature in blue ink that reads "Valerie Gaeta Phillips". The signature is written in a cursive, flowing style.

Valerie Gaeta Phillips
President, Bob Murray & Associates

TABLE OF CONTENTS

THE RECRUITMENT PROCESS	2
STEP 1 DEVELOP THE CANDIDATE PROFILE	2
<i>Optional Service: Community and Staff Involvement</i>	2
STEP 2 DESIGN/DISTRIBUTE BROCHURE AND ADVERTISEMENTS	2
<i>Reaching Diverse Candidates</i>	3
STEP 3 RECRUIT CANDIDATES	3
STEP 4 SCREEN CANDIDATES	4
STEP 5 CONDUCT PRELIMINARY INTERVIEWS	4
STEP 6 SEARCH PUBLIC RECORDS	4
STEP 7 MAKE RECOMMENDATIONS	4
STEP 8 FACILITATE FINAL INTERVIEWS	5
STEP 9 CONDUCT BACKGROUND AND REFERENCE CHECKS	5
STEP 10 ASSIST IN NEGOTIATIONS	5
COMPLETE ADMINISTRATIVE ASSISTANCE	6
COSTS AND GUARANTEE	7
PROFESSIONAL FEE AND EXPENSES	7
<i>Optional Services</i>	7
GUARANTEE	8
RECRUITMENT SCHEDULE	8
FIRM PROFILE	9
REFERENCES	12

THE RECRUITMENT PROCESS

Bob Murray & Associates' recruiters are specialists in finding positive placements and providing security and fairness to candidates and clients while ensuring the integrity of the search process. Outlined below are the steps in our proven recruitment process, refined through our 30+ years of experience in executive recruiting.

STEP 1 DEVELOP THE CANDIDATE PROFILE

Our understanding of the Monterey Peninsula Water Management District's needs will be key to a successful search. Adele Fresé, Stacey Stevenson, or Jon Lewis will meet with the General Manager and key stakeholders to learn as much as possible about the ideal candidate for the Assistant General Manager position. We want to become familiar with the values and culture of the organization, as well as to understand the current and future issues, challenges, and opportunities in the Monterey Peninsula Water Management District.

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

Optional Service: Community and Staff Involvement

We find that many of our clients value a recruitment process that opens the opportunity for community members, business leaders, organization representatives, and employees to provide input regarding the ideal candidate. Our recruiters are skilled in designing and facilitating forums, town hall meetings, and online surveys that allow equitable involvement from a variety of constituencies and in consolidating feedback into a cohesive narrative of common themes.

If the Monterey Peninsula Water Management District so desires, we will work with the General Manager to create a customized community and/or staff input process.

STEP 2 DESIGN/DISTRIBUTE BROCHURE AND ADVERTISEMENTS

Your Recruiter and your dedicated Recruitment Coordinator will use the candidate profile developed with the Monterey Peninsula Water Management District to create a professional recruitment brochure, with the assistance of our professional graphic designer. The four-page, full-color brochure will describe the community, organization, position, ideal candidate, and compensation and will include pictures provided by the Monterey Peninsula Water Management District that you feel best represent your organization and your community.

Upon your approval, your Recruiter will send the brochure by postal mail and email to a targeted audience, personally inviting potential candidates to apply for the Assistant General Manager position. We will also place the recruitment brochure on our [website](#), which attracts over 11,000

unique hits weekly and is a trusted resource for candidates seeking executive and professional positions. Two sample brochures are included in this proposal package for your reference.

Your Recruiter will also design an effective advertising campaign appropriate for the Assistant General Manager recruitment. Our broadest outreach comes through our active social media involvement on [Facebook](#), [LinkedIn](#), and [Twitter](#), where upcoming and current positions are posted. Sources such as *Western City Magazine*, PublicCEO, and the Careers in Government website will be used to reach an extensive local government audience, while position-specific postings will be chosen to attract candidates who have built their careers in and are committed to the Assistant General Manager field.

Suggested Assistant General Manager-specific advertising sources for the Monterey Peninsula Water Management District's search include:

- ◆ Association of California Water Agencies
- ◆ Air and Waste Management Association
- ◆ American Water Resources Association
- ◆ American Water Works Association
- ◆ Association of Women in Water, Energy, and the Environment

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

Reaching Diverse Candidates

Bob Murray & Associates, a woman- and minority-owned business, is proud of its commitment to attracting and placing diverse candidates. Not only do we place advertisements with websites designed to attract minority and female candidates, but our President, Valerie Phillips, is a member herself of many diversity-focused organizations including the Local Government Hispanic Network, the League of Women in Government, the Professional Women's Network, Mexican Professionals, and Women Leading Government. She networks frequently with fellow members to gain insight into which potential candidates are leaders in their field.

Your Recruiter will seek to reach candidates in communities and organizations with demographic profiles and populations served like that of the Monterey Peninsula Water Management District, to maximize the potential for individuals from a wide variety of backgrounds, cultures, physical abilities, life experiences, and gender to be considered for the Assistant General Manager position.

STEP 3 RECRUIT CANDIDATES

The strongest candidates are often those who are successful and content in their current positions and need to be sold on a new opportunity. Our extensive network of contacts, developed through over 1,400 successful placements, is a primary source for identifying and obtaining referrals for these candidates. Our in-house database of 40,000 current and former executive and professional candidates is a valuable resource that can only be built over time—time that we have invested into perfecting our process for finding the right candidates for our clients. Our aggressive outreach efforts are focused on phone calls to personally invite potential applicants, answer questions, and

allay any reservations, and these efforts are essential to the success of the Assistant General Manager recruitment.

STEP 4 SCREEN CANDIDATES

Following the closing date for the recruitment, your Recruiter will screen all resumes we have received, using the criteria established in the candidate profile as a basis upon which to narrow the field of candidates. Internal candidates receive sensitive consideration, and your Recruiter will discuss with the General Manager how the Monterey Peninsula Water Management District wishes to proceed with these candidates.

STEP 5 CONDUCT PRELIMINARY INTERVIEWS

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

STEP 6 SEARCH PUBLIC RECORDS

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

STEP 7 MAKE RECOMMENDATIONS

Based on our findings during the preliminary interview process, your Recruiter will recommend a limited number of candidates for your further consideration. Your Recruiter will make specific recommendations and will help facilitate discussions regarding the candidate pool, but the final determination of those to be considered will be up to you.

We typically recommend 6-8 candidates that we feel will best match your expectations, and we prepare a detailed written report on each candidate. This bound report provided to each member of the decision-making body includes:

- ◆ Candidate list with Recommended Finalists identified in *Group 1* and *Group 2* (primary and secondary recommendations), as well as *Internal* candidates
- ◆ Summary of experience and education for each Recommended Finalist candidate
- ◆ Complete cover letter and resume for each Recommended Finalist candidate
- ◆ List of *Other Applicants* (those who did not meet minimum qualifications or were otherwise unsuitable, based on our screening process)

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

STEP 8 FACILITATE FINAL INTERVIEWS

Our years of experience will be invaluable as we help you develop an interview process that objectively assesses the qualifications of each candidate. We will work with the Monterey Peninsula Water Management District to craft and implement an interview approach that fits your needs. This may include individual and panel interviews by the General Manager and key stakeholders, community/employee interview panels, writing and presentation samples, meet-and-greets, or another specialized process element your Recruiter helps the Monterey Peninsula Water Management District to design.

Your Recruiter will be present on-site during the interviews to facilitate as necessary during the process and to guide discussion to consensus regarding final candidates. Bound interview books will be provided to each interview panel member containing:

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

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

STEP 9 CONDUCT BACKGROUND AND REFERENCE CHECKS

Your Recruiter and your Recruitment Coordinator will conduct detailed reference checks for up to three (3) final candidates. To gain an accurate and honest appraisal of the candidates' strengths and weaknesses, we will talk candidly with people who have direct knowledge of their work and management style. In addition to gaining a 360-degree view of candidates from the perspective of their supervisors, subordinates and peers for the past several years, we will make a point of speaking confidentially to individuals who may have further insight into a candidate's abilities but who may not be on their preferred list of contacts.

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

STEP 10 ASSIST IN NEGOTIATIONS

We recognize the critical importance of successful negotiations and can serve as your representative during this process. Your Recruiter knows what other organizations have done to put deals together with great candidates and what the current market is like for Assistant General Manager positions in organizations like the Monterey Peninsula Water Management District's. Your Recruiter will be available to advise you regarding current approaches to difficult issues, such as housing and relocation. We will represent your interests and advise the chosen candidate and

you regarding salary, benefits, and employment agreements, with the goal of putting together a deal that results in the appointment of your chosen candidate. With our proven experience and vested interest in a positive outcome, we can turn a very difficult aspect of the recruitment into one that is straightforward and agreeable for all parties involved.

COMPLETE ADMINISTRATIVE ASSISTANCE

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

Candidates receive immediate acknowledgement of their applications, as well as personal phone calls and/or emails (as appropriate) advising them of their status at each critical point in the recruitment. Candidates who receive preliminary or final interviews and are not chosen to move forward in the interview process will receive personal calls from your Recruiter on behalf of the Monterey Peninsula Water Management District.

It is our internal company standard that all inquiries from clients and candidates receive a response within the same business day whenever possible, and certainly within 24 hours if the inquiry is received during the work week. Your recruiter will be available to the Monterey Peninsula Water Management District by office phone, cell phone, and email at any time to ensure a smooth and stress-free recruitment process.

COSTS AND GUARANTEE

PROFESSIONAL FEE AND EXPENSES

The fixed, flat professional services fee for conducting the Assistant General Manager recruitment on behalf of the Monterey Peninsula Water Management District is \$22,000. Services provided for in this fee consist of all steps outlined in this proposal, including two (2) days of meetings on site. The professional fee does not limit the amount of time invested by Bob Murray & Associates in promoting a successful outcome for this project. In fact, our mission for this project is to ensure we assist in identifying the right candidate for the Monterey Peninsula Water Management District. Therefore, Your Recruiter will contact the General Manager at the first anniversary of the placement to confirm an effective transition has occurred.

The Monterey Peninsula Water Management District will also be responsible for reimbursing expenses Bob Murray & Associates incurs on your behalf. We estimate expenses for this project not to exceed \$8,000. Reimbursable expenses include (but are not limited to) such items as the cost of recruiter travel; clerical support; brochure development; placement of ads; credit and civil background checks; education verification; and public records searches. Postage, printing, photocopying, and telephone charges are allocated costs and included in the expense estimate. *In no instance will expenses exceed this estimate without prior approval from the Monterey Peninsula Water Management District.*

Expense reimbursement for candidate travel related to on-site interviews will be the responsibility of the Monterey Peninsula Water Management District.

Professional Fees and Reimbursable Expenses	
Professional Services (Fixed Flat Fee)	\$22,000
Reimbursable Expenses <i>Example costs and approximate amounts include:</i>	
Brochure Design and Printing (\$1,275)	
Advertising (\$2,700)	\$8,000
Background Checks – 3 candidates (\$650)	
Consultant Travel (\$2,300)	
Other expenses – supplies, shipping, clerical (\$1,075)	
Not-to-Exceed Total	\$30,000

Optional Services

- Community/Staff Input Forum: \$1,500/day, plus travel expenses
- Online survey: \$1,000 (Surveys include formatting questions and preparing survey link. Services do not include summaries or analysis of data.)
- Additional on-site meeting days: \$1,500/day/recruiter, plus travel expenses
- Additional background checks: \$250/candidate
- Additional reference checks: \$500/candidate
- Additional hires: \$6,500/candidate
- Other services: \$250/hour or \$1,500/day

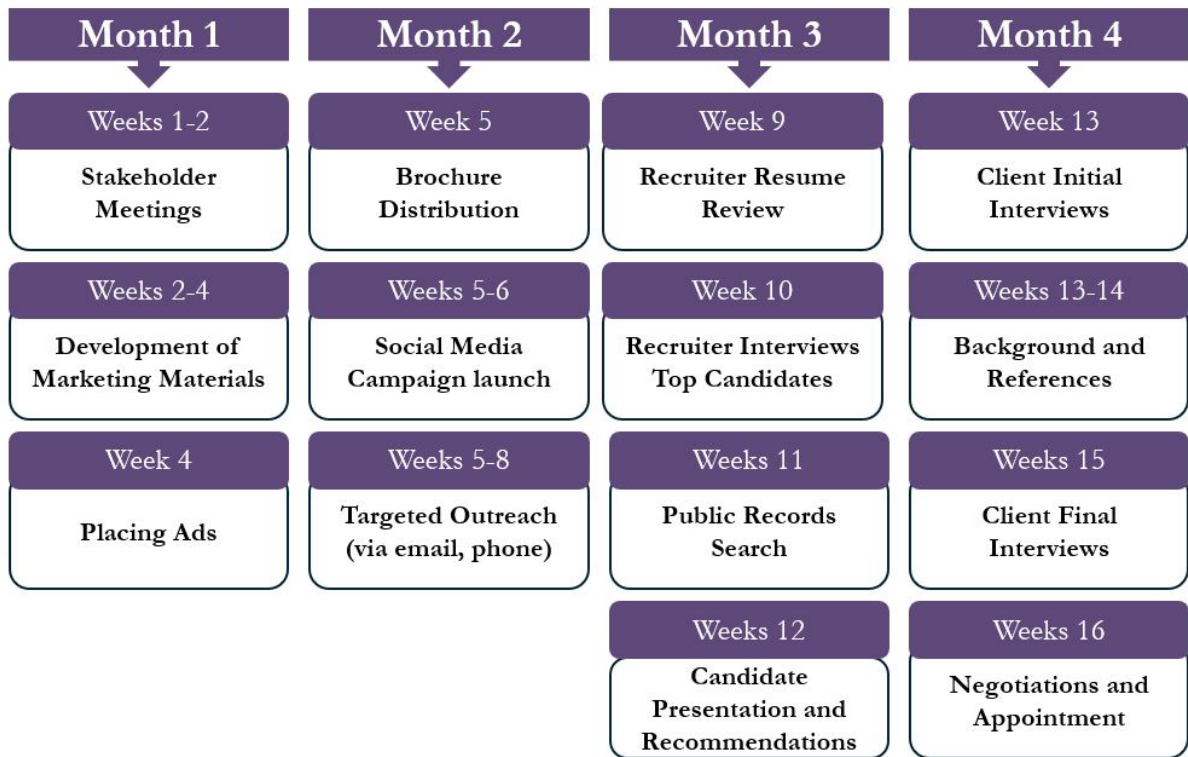
GUARANTEE

Should a candidate recommended by our firm position resign or be terminated within the first 12 months of employment, we will provide the Monterey Peninsula Water Management District with professional services to secure a replacement. Services will be provided at no cost, aside from expenses incurred on the Monterey Peninsula Water Management District’s behalf during the new search. We are confident in our ability to recruit outstanding candidates and do not expect the General Manager to find it necessary to exercise this provision of our proposal.

RECRUITMENT SCHEDULE

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

The final recruitment schedule will be determined in collaboration with Monterey Peninsula Water Management District. A typical timeline of tasks and events is included here for reference.



FIRM PROFILE

OUR STAFF

Bob Murray & Associates is a small firm focusing exclusively on executive search services. We have a team of thirteen (13):

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

ADELE FRESÉ, SENIOR EXECUTIVE RECRUITER

Adele Fresé brings 27 years of local government experience to Bob Murray & Associates, having retired as Chief of Police in Salinas, CA prior to joining the firm in 2021. Adele began her public service career in 1985 as an active-duty member of the United States Marine Corps before serving the City of Corpus Christi for 20 years.

Adele has extensive experience in hiring and promotional processes, as well as interviewing candidates for advancement in all aspects of local government.

During her 7 years as a Chief of Police, Adele exercised strong leadership and implemented monumental changes leading to the diversification of her agency's sworn staff. Adele's commitment to collaboration with the public and law enforcement agencies earned her the Partner of the Year Award from Homeland Security Investigations, and her Department the Community Policing Award from the Community Policing Institute of California.

Adele received her Bachelor of Science degree in Criminal Justice Administration from California State University at Hayward, and a minor degree in Sociology. She earned a Master of Science in Public Safety, completed the Senior Executives in State and Local Government program at the Harvard Kennedy School, and PERF's Senior Management Institute for Police. She is a Texas Certified Public Manager.

STACEY STEVENSON, SENIOR EXECUTIVE RECRUITER

In Ms. Stevenson's 32 years of service in municipal government, she worked for the California cities of San Diego, National City, and Murrieta. Ms. Stevenson began her professional career in City of San Diego as a Personnel Analyst and went on to work in the Personnel, Metropolitan Wastewater, Engineering, and Contracting departments; as well as the City Manager's office, progressing from Analyst to Deputy Director. She also assumed special projects such as the creation and opening of the City's neighborhood service centers and Liaison to the City Council.

From San Diego she joined the City of National City where she served as the Director of Human Resources, the Director of Administrative Services, and Deputy City Manager. She oversaw Community Services, Finance, Human Resources, and Information Technology; and managed special projects such as the balloting and passage of the City's local sales tax and the implementation of a new payroll module.

In the City of Murrieta, Ms. Stevenson served as Administrative Services Director and Deputy City Manager, again overseeing Community Services, Finance, Human Resources, and Information Technology, and managing special projects. Ms. Stevenson has also served as a commissioner on both the Child Care and Civil Service Commissions for the City of Chula Vista.

Ms. Stevenson holds a Bachelor's degree in Industrial Organizational Psychology as well as a Master of Business Administration degree with an emphasis in Human Resource Management.

JON LEWIS, EXECUTIVE RECRUITER

Jon Lewis brings over 30 years of municipal government experience to Bob Murray and Associates. Jon began his career in public service in 1991 with the City of Newport Beach, an iconic coastal community of 53 square miles in Southern California. After successfully working his way through the ranks of the Police Department, he honorably retired in December of 2022 after serving as the Chief of Police for nearly seven years. Jon is known for his commitment to selfless service, ethical leadership and maintaining longstanding community partnerships. During his tenure as Chief of Police, the Newport Beach Police Department achieved reduction in crime to historic lows through effective, data-driven community policing strategies as well as excellence in emergency response and 911 call answer times.

Jon graduated with honors from California State University Long Beach with a Bachelor of Science degree in Criminal Justice and Speech Communication and holds a Master of Arts degree in Criminal Justice from Chapman University. He is a graduate of several advanced law enforcement training courses including the California Commission on Peace Officer Standards and Training Command College. Jon has authored two university-level textbooks in criminal justice and is an instructor with the Center for Criminal Justice Research and Training at California State University Long Beach.

He and his wife, Darcy, have two children and reside in Orange County.

CORPORATION

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

GVP Ventures, Inc. OR Bob Murray & Associates
1544 Eureka Road, Ste. 280
Roseville, CA 95661
(916) 784-9080
apply@bobmurrayassoc.com

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

PROFESSIONAL ASSOCIATIONS

Our firm, represented by either our President or our Executive Vice President, are involved in the following organizations to remain engaged with current and future issues relevant to the work we conduct on behalf of clients like Monterey Peninsula Water Management District:

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

Members of our leadership team not only attend events sponsored by these associations but are also frequently called upon to serve as panel members and to provide specialized lectures regarding industry-specific issues.

Recent and upcoming speaking engagements and trainings provided by our staff include:

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

REFERENCES

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

CLIENT: Glenn-Colusa Irrigation District, CA
POSITION: General Manager
REFERENCE: Mr. Logan Dennis, Board Member
Mr. Blake Vann, Board Member
(530) 934-8881

CLIENT: Western Placer Waste Management Authority, CA
POSITION: General Manager
REFERENCE: Ms. Bonnie Gore, Board Member
(916) 672-7046

CLIENT: Mountain House Community Services District, CA
POSITION: Deputy General Manager
REFERENCE: Mr. Steven Pinkerton, General Manager
(209) 831-2300

CLIENT: Nipomo Community Services District, CA
POSITION: General Manager
REFERENCE: Ms. Jana Ettetdgue, Finance Director
(805) 929-1133

We appreciate the Monterey Peninsula Water Management District's consideration of our proposal and look forward to working with you.



October 4, 2024

Mr. David J. Stoldt
General Manager
Monterey Peninsula
Water Management District
5 Harris Court, Building G
Monterey, California 93940

Via Email: simona@mpwmd.net

Mr. Stoldt,

We are pleased to submit this Letter Proposal to recruit for the position of Assistant General Manager for the Monterey Peninsula Water Management District. We will *facilitate the recruitment process* and professionally *add value* to the entire recruitment and selection process.

Recent Utility Related Search Engagements

Below is a sampling of recent utility related searches at the executive level. We have only listed those agencies in California since the search for MPWMD will be focused in-state.

- Big Bear Municipal Water District, CA
 - General Manager (2024)
- Crescenta Valley Water District, CA
 - General Manager (2023)
- Elsinore Valley Municipal Water District
 - Assistant General Manager (2020)
 - Principal Engineer (2023)
- Fresno, CA
 - Director of Public Utilities (2022)
- Georgetown Divide Public Utility District
 - General Manager (2021)
- Glendale, CA
 - General Manager, Water & Power Department (2021)
- Manhattan Beach, CA
 - Utilities Manager (2023)
- North Kern Water Storage District, CA
 - General Manager (2021)

- North Marin Water District, CA
 - Assistant General Manager/Chief Engineer (2022)
- Oro Loma Sanitary District, CA
 - General Manager (2022)
- San Lorenzo Valley Water District, CA
 - General Manager (Current Search)
- Tri-Dam Project, CA
 - General Manager (2022)
- Water Facilities Authority, CA
 - General Manager (2023)
- WateReuse Association-CA, CA
 - Managing Director (2024)
- Westside Water Authority, CA
 - Executive Director/General Manager (2020)

Project Staffing

The reputation of the search firm and personal commitment of the recruiters define the difference between the success and failure of any given recruitment. Ralph Andersen & Associates' search professionals are acknowledged leaders in the field and possess a broad range of skills and experience in the areas of local government management, executive search, and related disciplines. Only senior members of Ralph Andersen & Associates are assigned to lead search assignments, ensuring that their broad experience and knowledge of the industry is brought to bear on our clients' behalf.

The Monterey Peninsula Water Management District will have the search team of Ms. Heather Renschler as Project Director supported by Mr. John Rossi Senior Consultant. ***Ms. Renschler will be the lead and primary recruiter on this engagement. The Search Team will have all the resources and full support of our firm fully dedicated to ensuring the highest quality outcome during this important recruitment process.***

Ms. Heather Renschler, Project Director



Ms. Renschler has been with Ralph Andersen & Associates for more than 38 years and is the firm's President/CEO. Ms. Renschler has overseen the recruitment practice of Ralph Andersen & Associates for the last 26 years and, as a result, is often involved with recruitments on a national scale and those of a highly sensitive and critical nature. She is experienced at working with boards, city councils, staff members, and selection committees in the recruitment and selection process.

Ms. Renschler has extensive experience in conducting public sector recruitments and, as a result, has developed a network of contacts and potential candidates on a national basis. Ms. Renschler has had significant involvement in human resources related searches over an extended period of time, and as a result, has an extensive network from which to attract potential candidates.

Prior to joining Ralph Andersen & Associates, Ms. Renschler had extensive private sector experience in the areas of construction management, health care, and public accounting. Ms. Renschler attended the University of Toledo and majored in Accounting and Journalism and obtained a Bachelor's degree in Public Administration from the University of San Francisco.

Mr. John Rossi, Senior Consultant



Mr. Rossi, Senior Consultant with Ralph Andersen & Associates, specializes in executive search and consulting for water utilities and other public agencies. He has had an extensive career in the public water and wastewater utility sector and has held the positions of CEO/General Manager with three agencies in California over an 18 year period. As General Manager of the Western Municipal Water District, Mr. Rossi was responsible for the 500-square mile water district including wholesale and retail water, wastewater, and reclaimed water operations. Mr. Rossi was previously a court appointed Watermaster for the Santa Ana River surface water and Western ground water adjudications.

Mr. Rossi has served on a number of boards of state and national water related associations such as the Association of California Water Agencies, WateReuse, Urban Water Institute, and the California Municipal Utilities Association where he served as President. He was a founding member of the California Utility Executives Management Association and past President as well as being elected to his local water board – the Rancho California Water District where he is currently serving as President. Mr. Rossi was recognized by the Association of California Water Agencies with their Excellence in Leadership award in 2013 for his contributions to the water industry. He also served on the University of California Riverside's Board of the Water Policy and Science Center.

Prior to work in the water utility industry, Mr. Rossi began his career in public accounting and specialized in work with private water companies and water districts including rate work with the California Public Utilities Commission.

Mr. Rossi has a Bachelor's degree in Business Administration and is a Certified Public Accountant (inactive) in the State of California.

Paraprofessional and Support Staff

Paraprofessional, graphics, and support staff will provide administrative support to the consultant team on recruitment assignments. These may include Ms. Diana Haussmann, Ms. Christen Sanchez, Ms. Hannah Jones, Ms. Karen AllGood, and Ms. Tina Keller.



Approach to Executive Search

The successful search process relies heavily on person-to-person contact to identify outstanding potential candidates and, in the evaluation phase, to gain a complete understanding of the background,

experience, and management style of the top candidates. The executive recruitment techniques used by Ralph Andersen & Associates have been developed and used successfully with hundreds of clients for more than 52 years.

We feel that the key elements of the *full search* process, which can be tailored to fit the specific needs of the District, should include:

- Developing a comprehensive position profile based upon information obtained in various meetings with the General Manager, Human Resources, and other designated District staff.
- Reviewing current compensation and recommending changes based upon market and competitive conditions.
- Extensive personal outreach to highly qualified candidates throughout California and the Western Region.
- A marketing strategy that uses selected advertising to supplement the extensive candidate identification process, the Internet, and professional contacts throughout California.
- A screening process that narrows the field of candidates to those that most closely match the needs of the District and is based on screening interviews with the top candidates. Candidates' education, experience, and credentials are matched to the criteria established in the position profile.
- Candidates would be screened via video technology to determine their overall "match."
- Delivering a product in the form of a search report that recommends a top group of candidates and provides the General Manager with detailed information about their backgrounds and experience.
- Assistance during the interview and selection process and in the negotiation of a compensation package.

Ralph Andersen & Associates has an outstanding reputation for being thorough and professional in the approach it takes in recruitments. Each candidate's match with the position is based on the individual's own set of professional experiences, management style, education and credentials, and overall fit with the organization and executive leadership.

Search Work Plan

This section describes the usual steps in the search for a new Assistant General Manager for the Monterey Peninsula Water Management District. This recruitment will be under the direction Ms. Heather Renschler, Project Director.

Task 1 – Review Project Management Approach

The Search Team will begin work after the District provides a contract or, alternatively, an official notice to proceed. The first task will include established individual and/or group video meetings with the General Manager, human resources staff, and others (done via the Zoom Technologies application), as appropriate, to finalize the recruiting and selection process. This will include discussion of the project management for this search, review of the work plan, confirmation of timing, and communication methods. Working collaboratively with the General Manager, human resources staff, and key District staff, this task will result in a more definitive timetable.

As part of our overall approach to this project, the Search Team will deliver regular status reports at each stage of the search. Additionally, the Search Team will be highly accessible and responsive to client requests and inquiries.

Task 2 – Develop Position Profile

The position profile for the Assistant General Manager is the guide for the entire search process. The development of the profile includes the collection of technical information and recruitment criteria.

Technical Information

A member of the Search Team will conduct video meetings with the General Manager, human resources staff, key staff members, as directed by the District to gain an understanding of the experience and professional background requirements desired in the Assistant General Manager. These meetings, all done via video conferencing, will also help the Search Consultant gain an understanding of the work environment and the issues facing the Monterey Peninsula Water Management District.

Recruitment Criteria

The recruitment criteria are those personal and professional characteristics and experiences desired in the Assistant General Manager. The criteria should reflect the goals and priorities of the Monterey Peninsula Water Management District.

Subsequent to the development and adoption of the candidate profile, the technical information and recruitment criteria will be documented in an information brochure prepared by Ralph Andersen & Associates. The brochure will be reviewed by the District in draft format, revised as appropriate, and published for use throughout the search.

Information obtained through individual meetings can be summarized if needed or more appropriately captured in the brochure as part of the search process. Important to note, the source of the information will remain confidential.

Task 3 – Outreach and Recruiting

This task is among the most important of the entire search. It is the focus of the activities of the Search Team and includes specific outreach and recruiting activities briefly described below.

Outreach

An accelerated outreach and advertising campaign will be developed. It will include the placement of ads in publications such as the BC Water Jobs, California Special District Association (CSDA), Association of California Water Agencies (ACWA), Western City Magazine, and other professional associations. Specific Internet sites related to government will be used as a method of extending the specific outreach in a short period of time.

Additionally, the advertisement and the full text of the position profile (the recruitment brochure) will be placed on Ralph Andersen & Associates' website, which is accessed by a large number of qualified candidates. This method of outreach to potential applicants provides a confidential source that is monitored by many key level executives on an on-going basis.

Candidate Identification

Ralph Andersen & Associates will use their extensive contacts to focus the recruiting effort. In making these contacts, the Search Team will target those individuals who meet the criteria set by the District. Each of the candidates identified through the recruiting efforts will be sent an

information brochure. Candidates will also be contacted directly to discuss the position and to solicit their interest in being considered.

Both the outreach and recruiting activities will result in applications and resumes from interested candidates. As they are received, resumes will be acknowledged and candidates will be advised of the general timing of the search process. The following tasks involve the actual selection process, once all resumes have been received.

Task 4 – Candidate Evaluation

This task will be conducted following the application closing date. It includes the following specific activities:

Screening

All of the applications will be carefully reviewed. Those that meet the recruitment criteria and minimum qualifications will be identified and subject to a more detailed evaluation. This evaluation will include consideration of such factors as professional experience, and size and complexity of the candidate's current organization as compared to the candidate profile.

Preliminary Research and Internet Review

The research staff of Ralph Andersen & Associates, under the direction of the Search Team, will conduct preliminary research and internet review for those candidates identified as the most qualified as a result of the screening process. This level of research will be done on a limited number of candidates to learn more about each candidate's public profile and related information that is available on the internet.

Preliminary Interviews via Video Technology

A member of the Search Team will conduct preliminary interviews with the top group of candidates identified through the screening and preliminary research and Internet review processes. The interviews are extensive and designed to gain additional information about the candidates' experience, management style, and "fit" with the recruitment criteria. Interviews will be conducted using video technology.

The screening portion of the candidate evaluation process will typically reduce the field of applicants to approximately four (4) to six (6) individuals. Those individuals will be reviewed with the District prior to proceeding with the individual interviews.

Task 5 – Search Report

After completing Task 4, all documentation will be supplied to the District electronically. No hard copies will be supplied to the District for any phase of this search engagement. The Search Team will prepare detailed information for review including resumes uploaded to a file sharing system (i.e., ShareFile). The Search Team will conduct a video conference with the General Manager, human resources staff, or other designated representatives to review the search report on the top candidates. The report divides all of the candidates into four groups including 1) the top group of candidates that are recommended to be interviewed via video by the District; 2) a backup group to the first group; 3) no further consideration group; and 4) lacks minimum qualifications. The search report will include candidate resumes and cover letters. The results of preliminary media research will be included. This video meeting will result in a confirmed group of top candidates for the General Manager to further consider.

Important to note, we do not conduct references on all of the finalist candidates until the top candidate has been selected. Periodically, we may recommend conducting references on the top two candidates to assist the hiring authority in the final selection and this is done in the final stages of the search process and may involve a supplemental fee. Verifications such as credit check, DMV Report, and civil/criminal are typically conducted once a contingent offer is made to the selected candidate unless the finalist candidate(s) give explicit approval and sign a release to proceed. Verifications are not conducted on all finalists other than the more standard education check before interviewing with the General Manager.

The results of the Search Report will be a confirmed group of finalist candidates that the General Manager will interview.

Task 6 – Selection

The final selection process will vary depending upon the desires of the District. The typical services provided by Ralph Andersen & Associates in the selection process are described briefly below:

- The Search Team will coordinate the selection process for the finalist group of candidates. This includes handling the logistical matters with candidates and with the District.
- Ralph Andersen & Associates will prepare an electronic interview booklet (uploaded to a file sharing program such as DropBox or ShareFile) that includes the resume, cover letter, and preliminary media research for each candidate. In addition, this electronic information will contain suggested questions and areas for discussion based upon the recruitment criteria. Electronic copies of the interview booklet will be provided in advance of the candidate interviews. No hard copies of material will be provided. Should the District desire hard copies, that will be the responsibility of the District to produce and distribute.
- The Search Team will facilitate the Interviews to assist the District through the selection process. This assistance will include an initial orientation, candidate introductions, and facilitation of discussion of candidates after all interviews have been completed.
- Additionally, verifications will be made on the top two candidates and will include education verifications, Department of Motor Vehicle check, and credit check. Due to legislation, criminal checks (“Ban the Box”) are only permissible when a contingent offer of employment is made. The results of these verifications will be discussed with the District at the appropriate time.
- Reference checks will be conducted on the top candidate. The results of these reference checks will be discussed with the District at the appropriate time. Reference checks on more than one candidate will incur a supplemental fee.
- As needed, a member of the Search Team is available to provide assistance to the District in the final selection as may be desired. This assistance may include providing or obtaining any additional information desired to assist in making the final selection decision.

Task 7 – Negotiation

A member of the Search Team is available to assist the District in negotiating a compensation package with the selected candidate. This includes recommendations on setting compensation levels.

Task 8 – Close Out

After the District has reached agreement with the individual selected for the position, the Search Consultant will close out the search. These activities will include advising all of the finalist candidates of the status of the search by telephone.

Project Timing

We anticipate a timeframe of approximately 90 – 120 days from the execution of the agreement between the District and Ralph Andersen & Associates to when the finalists are presented for an interview. Negotiation with the top candidate will take an additional week after finalist interviews.

We are prepared to begin this recruitment effort within 10 days upon notification of award.

A sample timeline is provided below.

Task	Estimated Week of Completion
Task 1 – Review Project Management Approach	Week One
Task 2 – Develop Position Profile and Recruitment Brochure	Week One – Week Two
Task 3 – Outreach and Recruiting	Week Two – Seven
Task 4 – Candidate Evaluation	Ongoing Throughout Process (typically more focused during Week Six and Week Seven)
Task 5 – Search Report	Week Eight – Week Nine
Task 6 – Selection	Week Nine – Week Ten
Task 7 – Negotiation	Week Ten – Week Eleven
Task 8 – Close Out	Week Twelve

Project Cost

The recruitment efforts for a new Assistant General Manager will be a comprehensive search process with a focus in California. The review of resumes and qualifications will be conducted on all candidates that submit giving the District the ability to select from a broad field of qualified candidates. **The professional services fee (inclusive of expenses*) to perform the Assistant General Manager search will be a fixed fee of \$36,750.**

***Note** – Expenses included in this fixed fee include such items as advertisements, consultant interaction (anticipated to be primarily through videoconferencing with the exception of finalist interviews), clerical, research, graphic design, printing (documentation submitted using file-sharing software), postage and delivery, verifications and Internet and Lexis/Nexis searches on the top candidates. References will be conducted on the top candidate during the final stage of the process.

Invoicing – Ralph Andersen & Associates will bill the District in four installment payments as follows:

- Following kick-off and finalization of recruitment brochure - \$11,025
- After the closing date - \$11,025
- After finalist interviews - \$11,025
- Upon placement - \$3,675

Progress payments will be due upon receipt.

Brochure – A full color electronic brochure will be developed for the Assistant General Manager recruitment. All pictures will be the responsibility of the District. The District will also be responsible for ensuring that there are no copyright restrictions on the photographs supplied to Ralph Andersen & Associates and that the District will agree to pay any and all related charges or fines if a copyright violation is incurred either during the search itself or subsequently.

Exclusions – The Monterey Peninsula Water Management District will be responsible for all candidate expenses related to on-site interviews.

Ralph Andersen & Associates' Guarantee

Ralph Andersen & Associates offers the industry-standard guarantee on our full search services. If, within a one-year period after appointment, the Assistant General Manager of the Monterey Peninsula Water Management District resigns or is dismissed for cause, we will conduct another search free of all charges for professional services. The District would be expected to pay for the reimbursement of all incurred expenses.

If a placement is not made in the first outreach effort, the Consultant will conduct a second outreach effort with no charge for Professional Services. The District would be expected to pay for all incurred expenses.



Should you need any additional information, please feel free to call Ms. Renschler at (916) 630-4900 (office) or (916) 804-2885 (cell).

Respectfully Submitted,

Ralph Andersen & Associates

Ralph Andersen & Associates

WBCP RECRUITMENT SERVICES

OPTION 1

PARTIAL RECRUITMENT

ADVERTISING & HEADHUNTING

**Consulting Services:
\$5,900**

CONSULTING SERVICES INCLUDE:

- Hiring authority and stakeholder meetings (up to 2 hours for community/employee engagement)
- Develop ideal candidate profile & recruitment timeline
- Produce recruitment announcement
- Produce and implement advertising campaign
- Headhunt (LinkedIn, past lists, databases, associations, etc.)
- Implement direct mail campaign (as needed)

Plus expenses: Between **\$3,000 - \$4,500** for the advertising plan and creative brochure

Does not include:

- Travel to client location
- Interview panel coordination
- Background or reference checks
- 12-24 month guarantee

OPTION 2

PARTIAL RECRUITMENT

UP TO INTERVIEWS

**Consulting Services:
\$18,900**

CONSULTING SERVICES INCLUDE:

Everything in Option 1, plus...

- Hiring authority and stakeholder meetings (up to 8 hours for community/employee engagement)
- Application screening
- Shortlist recommendations
- Produce recommended selection assessment tools
- Coordinate candidate scheduling and invitations to interview

Plus expenses: Between **\$3,000 - \$4,900** for the advertising plan and creative brochure

Does not include:

- Travel to client location
- Interview panel coordination
- Background or reference checks
- 12-24 month guarantee

OPTION 3

FULL SEARCH SERVICES

**Consulting Services:
\$24,900 - \$28,900***

*Depending on position

CONSULTING SERVICES INCLUDE:

Everything in Option 2, plus...

- Hiring authority and stakeholder meetings (up to 2 days of community/employee engagement)
- Panel coordination & interview facilitation
- Background and reference checks
- Virtual and/or in-person interviews (travel up to 2 trips) to client location
- 12-24 month guarantee

Plus expenses: Between **\$5,500 - \$7,900** for the advertising plan and creative brochure; travel expenses; shipping; multiple panel facilitation, etc.



WBCP

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HOURLY RECRUITMENT SERVICES

SENIOR RECRUITMENT
CONSULTING SERVICES

\$250/hour