

City of Delray Beach

Executive Search Services – Internal Auditor

PROPOSAL / OCTOBER 15, 2024



October 15, 2024

Duane D'Andrea, M.A., PHR, SHRM-CP
Director, Human Resources
City of Delray Beach
100 NW 1st Avenue
Delray Beach, FL 33444

Subject: Proposal for Executive Search Services

Dear Duane D'Andrea:

We are pleased to submit this proposal for executive search services. Our focus has always been to help local government and utility clients solve their financial, organizational, and technology challenges. We are dedicated to providing management consulting services, including executive search, to local governments and the utility industry.

Our project team for the City comprises skilled professionals, seasoned in local government management with search experience across the country. Our team has completed over 350 searches, and we have had significant success in identifying and retaining ideal candidates who meet each organization's unique set of needs and expectations. We are confident our approach will result in a successful leader for the organization. Our mission is to strengthen communities, and we do this by helping them find the best leaders to help move their organizations forward.

We look forward to the opportunity to serve the City of Delray Beach. If you have any questions, please contact Catherine Tuck Parrish, our executive search practice leader, using the following contact information:

Catherine Tuck Parrish, Vice President
Phone: 240.832.1778 / Email: ctuckparrish@raftelis.com

Sincerely,

A handwritten signature in black ink that reads 'Julia Novak'.

Julia Novak, *Executive Vice President*



Making our world better

The Raftelis Charitable Gift Fund allocates profits, encourages employee contributions, and recognizes time to charitable organizations that support:

- Access to clean water and conservation
- Affordability
- Science, technology, and leadership

Raftelis is investing in improved telecommunication technologies to reduce the firm's number one source of carbon emissions—travel.



Diversity and inclusion are an integral part of Raftelis' core values.

We are committed to doing our part to fight prejudice, racism, and discrimination by becoming more informed, disengaging with business partners that do not share this commitment, and encouraging our employees to use their skills to work toward a more just society that has no barriers to opportunity.

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FIRM OVERVIEW

Who We Are

RAFTELIS HELPS LOCAL GOVERNMENTS AND UTILITIES THRIVE.

Local government and utility leaders partner with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 700 organizations in the last year alone. We provide trusted advice, and our experts include former municipal and utility leaders with decades of hands-on experience running successful organizations. People who lead local governments and utilities are innovators—constantly seeking ways to provide better service to the communities that rely on them. Raftelis provides management consulting expertise and insights that help bring about the change that our clients seek.

TNCG is Now Raftelis

The Novak Consulting Group (TNCG) and Raftelis have always shared a focus on delivering lasting solutions for local government agencies. In January 2020, TNCG joined Raftelis. Today, we provide our clients with wide-ranging capabilities and resources in financial, management, technology, and communications consulting for all areas of local government. Our clients now have the expertise of more than 180 of the country's leading local government and utility consultants, who have decades of experience. We know that our combined capabilities and resources will provide added value to our clients, and we're excited about what we can accomplish together.

We believe that Raftelis is the *right fit* for this project. We provide several key factors that will benefit the City and help to make this project a success.

RESOURCES AND EXPERTISE: This engagement will require the resources necessary to effectively recruit for your unique position and the skillsets to complete all of the required components. With more than 180 consultants, Raftelis has one of the largest local government management and financial consulting practices in the nation. Our depth of resources will allow us to provide the City with the technical expertise necessary to meet your objectives. In addition to having many of the industry's leading management and financial consultants, we also have experts in key related areas, like stakeholder engagement and data analytics, to provide additional insights as needed.

DECADES OF COLLECTIVE EXPERIENCE: Our associates and subject matter experts have decades of experience in strengthening local municipalities and nonprofit organizations. They've served in a wide range of positions, from city manager to public works director to chief of police.

PERSONAL SERVICE FROM SENIOR-LEVEL CONSULTANTS: You appreciate it when deadlines are met, phone calls are returned, and your challenges are given in-depth, out-of-the-box thinking. While other firms may assign your business to junior-level people, our approach provides exceptional service from senior-level consultants.

NICHE EXPERTISE: Our expertise lies in strengthening public-sector organizations. We're consulting specialists rather than generalists, focusing our strengths to do a highly effective job for a specific group of clients.

FIRM CAPABILITIES



EXECUTIVE SERVICES: Identify and develop top talent to lead local governments and utilities

- Executive recruitment
- Executive coaching
- Executive performance evaluations



COMMUNICATION: Inform and engage with your stakeholders to build understanding and support

- Strategic communication planning
- Public involvement and community outreach
- Public meeting facilitation
- Graphic design and marketing materials
- Media and spokesperson training
- Risk and crisis communication
- Social media strategy
- Visual facilitation
- Virtual engagement
- Technical writing and content development



STRATEGIC PLANNING/FACILITATION: Plan for the future to guide your organization to success

- Organization, department, and community-based strategic planning
- Climate action planning
- Effective Board / Commission / Council governance
- Retreat planning and facilitation



ORGANIZATIONAL ASSESSMENT: Identify needs, plan for the future, and implement positive changes

- Organizational and operational assessments
- Performance measurement
- Staffing analysis
- Sustainability
- Organizational climate and culture
- Asset management and operations
- Regional collaboration and service sharing



FINANCE: Promote financial integrity and the equitable recovery of costs to achieve your objectives

- Rate, charge, and fee studies
- Financial and capital planning
- Cost of service and cost allocation
- Customer assistance programs
- Affordability analysis
- Utility valuation
- Budget development
- Financial condition assessments
- Debt issuance support
- Economic feasibility and analysis
- Regulated utility support



TECHNOLOGY: Gain insights from your data and develop tools to increase effectiveness and engagement

- Cybersecurity services
- Strategic technology planning services
- Financial management technology services
- Customer management technology services
- Maintenance and asset management technology services
- Data management, analytics, and visualization
- Custom software solutions



SOLID WASTE SERVICES: Deliver effective solid waste services while ensuring financial sustainability and customer engagement

- Solid waste plans
- Grant application assistance
- Planning, procurement, and implementation
- Regulation and compliance
- Benchmarking and best practices



STORMWATER UTILITY SERVICES: Implement sustainable financial practices to equitably fund your stormwater program

Stormwater utility development and implementation support

PROJECT APPROACH

Executive Search Strategy

When organizations need to fill key positions, they turn to Raftelis and benefit from this guiding principle: meaningful hiring involves finding the right employee and preparing them for ongoing success. Our approach to executive search services comprises three key phases.

Inquiring, Understanding, and Defining

Each of our clients has a unique culture and set of objectives. Because selecting the right individual is critical to success, we begin our relationship by conducting a needs assessment to identify the specific benchmarks the search must accomplish. We will identify qualifications and requirements as well as map out the new hire's first-year goals, so both our client and the employee remain on the same track for success. We will build an accurate position profile, thus ensuring we attract the right people for the position.

Candidate Search and Evaluation

To reach the right candidates, Raftelis customizes each search process to fit the client's needs. Often, the professionals who best fit an open position are already employed and not searching for a traditional job posting. So, we leverage our extensive, diverse professional network to attract the best talent nationwide. We have been successful in identifying a candidate pool that is racially, ethnically, and gender diverse. We are committed to helping local government leadership positions reflect the communities they serve. We work closely with several organizations that support this goal, and we advertise in national publications that target people of color and women, including the National Forum of Black Public Administrators (NFBPA), the Local Government Hispanic Network, and the League of Women in Government. We intentionally seek well-qualified women and people of color, so our clients have excellent choices. Once the right candidates are found, we help manage the hiring process, from interviews to background checks. Our in-depth service empowers clients to achieve their goals at every step.



39% of our recruitments resulted in the hiring of **females**

21% of our recruitments resulted in the hiring of **people of color**

Supporting Success

We support the top candidate's long-term success by creating a goals-driven work plan that is actionable from day one. Many firms focus solely on finding qualified applicants, leaving the client on their own once the position is filled. Our team, however, uses the objectives gathered during the inquiry stage to prepare new hires for their first year. We take a tailored, goals-based approach to each recruitment. By looking beyond the hiring process, our holistic view ensures that each candidate will fit the role as well as the organization. In the end, we are not just looking for a successful professional; we are finding the right employee to be successful in their new position long after they are hired.

Work Plan

THE FOLLOWING PROVIDES A DETAILED DESCRIPTION OF OUR WORK PLAN FOR THE INTERNAL AUDITOR RECRUITMENT.

Activity 1 – Develop Candidate Profile

We will begin this engagement by developing a clear picture of the ideal candidate for this position. We will begin by speaking with each member of the City Commission individually. We will also facilitate a meeting to gather input from the Human Resources Director as well as three additional meetings to include department heads. We will discuss not just the technical skills needed for the position, but what makes for the right organizational fit in terms of traits and experiences. All meetings will be virtual, except for the final interviews, which will be in person. An additional fee will be charged for any additional in-person meetings added beyond this scope.

Based on the information learned from our meetings, we will develop a recruitment plan that includes Florida and the nation. We will prepare a position profile that is unique to the City of Delray Beach. The profile will identify the organization's needs, the strategic challenges of the position, and the personal and professional characteristics of the ideal candidate. This document drives the recruitment. It focuses our efforts on the most capable candidates, and it helps us to persuade candidates to pursue the position. We will develop a recruitment brochure for advertising the position which includes the position profile, as well as information on the organization, the City, and the community. We will work with the City to eliminate barriers to underrepresented groups, including years of service, levels of education, and other strict requirements that might eliminate someone who can do the job.

We will also develop first-year organizational goals for the successful candidate. These goals will ensure that the applicants know what will be expected of them should they be hired, the City has thought about what it wants the person to accomplish in the first year, and the successful candidate can hit the ground running with a work plan. Once drafted, we will review the recruitment plan, position profile, and first-year goals with the City Commission. Modifications will be made as necessary before recruitment begins.

DELIVERABLES:

- Detailed recruitment process documents, including recruitment plan, position profile, and first-year goals

Activity 2 – Conduct Outreach and Initial Screening

As part of the recruitment plan, we will identify key states and metro areas to focus our targeted recruitment. We will prepare and place advertisements in state and national publications and websites to attract candidates throughout the United States. While this will be a national search, we will target our efforts to those key areas identified in the recruitment plan. We understand the importance of having a diverse applicant pool, so our recruitment strategy includes a robust outreach strategy to identify and attract well-qualified individuals from underrepresented groups and encourage them to apply. In our outreach, we ensure we place job postings in places that target women, minorities, and other underrepresented groups. We also utilize our networks across the country to find and attract well-qualified candidates from a variety of backgrounds to apply and be considered. In addition, our recruiters have participated in conferences like NFBPA and Engaging Local Government Leaders (ELGL) for networking, a Diversity, Equity, and Inclusion cohort through the International City/County Management Association (ICMA), and several leadership academies for women in local government in different states.

We will place job postings with national, state, and regional professional organizations such as the Florida Chapter of the Institute of Internal Auditors, Association of Local Government Auditors, Florida League of Cities, ICMA, a LinkedIn Job Ad, and other places as identified in the recruitment plan. We also recommend national organizations such as ELGL, NFBPA, League of Women in Government, and the Local Government Hispanic Network to attract underrepresented groups and provide a more diverse applicant pool. We will also reach out to historically black colleges and universities and other targeted alumni networks that have graduates from diverse backgrounds and ask them to share our postings.

As soon as the advertisements are completed, we will begin the process of actively and aggressively marketing the position and identifying qualified candidates for assessment. We will pinpoint individuals and jurisdictions to reach out to directly through phone and email. We will also utilize social media (LinkedIn, Twitter, and Facebook) to broaden our reach. We have found that this combination of outreach is an effective way to reach top applicants, especially those who are not currently in the job market but may be willing to consider a move to an excellent organization like the City of Delray Beach.

We will reach out to the applicants in our extensive database as well as the prospective candidates we have targeted in previous recruitments for similar jurisdictions. We will also develop a list of additional candidates to pursue based on the City's unique needs. Our outreach includes seeking well-qualified women and people of color and encouraging them to apply.

As applications are received, we will acknowledge each one and keep applicants aware of the status of the process. We will screen each applicant against the position profile and first-year goals. We will conduct interviews via phone or videoconference with those who most closely meet the profile to learn more about their interest, qualifications, and experience for this position. A written summary of these candidates will be prepared and shared with the City. We will then meet with the City Commission to review the entire list (if desired) as well as the most qualified candidates who have the requisite skills, experiences, and traits needed for success in the position. Based on the direction of the City Commission, we will finalize a list of four to six candidates to invite for interviews.

DELIVERABLES:

- Placement of ads and job postings
- Targeted outreach to passive candidates
- Candidate review materials, including screening results and internet search

Activity 3 – Support Interviews and Selection

Each person you wish to interview will then be contacted again by our recruitment team. We will plan and facilitate a multi-step interview process specific to the position. The process could include writing exercises, presentations, panel interviews, tours, and a department director or key staff meet-and-greet. A book that contains customized interview questions and information about each of the candidates invited to interview will be provided to those involved in the interview process. We will also facilitate pre- and post-interview briefings.

We will coordinate the logistics of the process and provide the candidates with the details along with any travel policy requirements or other information. We will also work with a City contact to ensure a suitable venue is arranged for the interviews. Expenses for the candidates will be borne and reimbursed directly by the City.

The City will select the top candidate. We can help make a well-informed choice by framing what we have learned about the candidates in the context of the position and its requirements. We will speak with candidates' references

to confirm the strength of their credentials. We will also conduct a media check to review published information found in search engines, online publications, and social media. Reference and background checks will be performed on the top candidate, including but not limited to education, credentials, employment history, criminal background check, civil litigation check, and credit history.

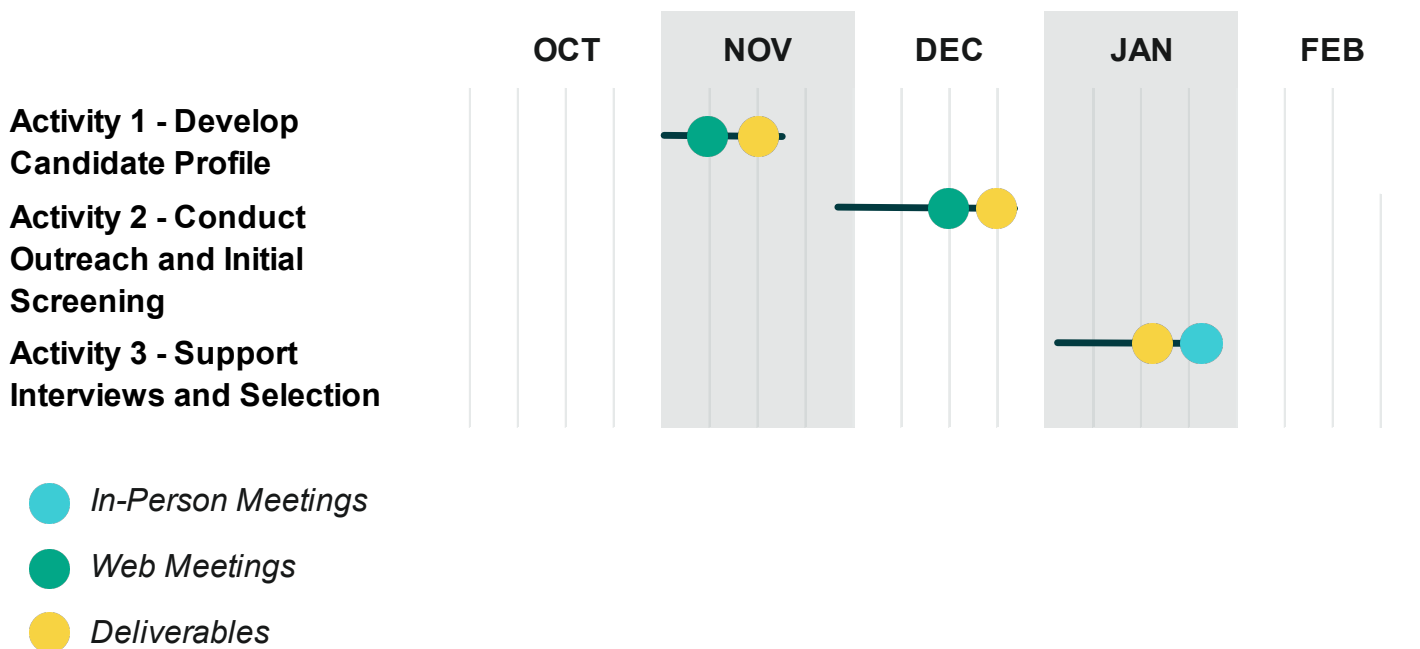
We also can assist in negotiating the employment offer. We will provide information about best practices in salary and total compensation, and we will have obtained information on the candidate’s salary preferences. We will keep candidates apprised of their status and release them at the appropriate time.

DELIVERABLES:

- Interview book materials
- References and background check on top candidate

Recruitment Timeline

Included below is a draft timeline. We expect to review this with the City during Activity 1 and adjust it as necessary as we develop the recruitment plan.



REFERENCES

References

Raftelis is uniquely positioned to perform this recruitment because of our knowledge of local government and our extensive network across the nation. Our clients tell us we are more than just consultants—we are trusted advisors. The following table lists a few comparable recruitments we have conducted and references for each of them.

Client	Reference
Buncombe County, North Carolina <ul style="list-style-type: none"> • Finance Director (2023) • Internal Audit Director (2023) 	Avril Pinder, County Manager P: 828.250.4101 E: avril.pinder@buncombecounty.org
City of Loveland, Colorado <ul style="list-style-type: none"> • City Clerk (2024, 2020 – partial search) • Economic Development Director (2024 – partial search) • Chief Financial Officer (2019 – partial search) • Budget Manager (2016 – partial search) 	Julia Holland, Human Resources Director P: 970.962.2372 E: julia.holland@cityofloveland.org
City of Gaithersburg, Maryland <ul style="list-style-type: none"> • City Attorney (2024) • IT Director (2022) • Finance Director (2020, 2022) • City Manager (2020) • Director of Finance and Administration (2019) • Engineering Services Division Chief (2019) • Public Works Director (2013, 2020) 	Tanisha Briley, City Manager P: 301.258.6300 E: tanisha.briley@gaitersburgmd.gov Dennis Enslinger, Deputy City Manager P: 301.258.6310 E: dennis.enslinger@gaitersburgmd.gov
City of Westerville, Ohio <ul style="list-style-type: none"> • City Clerk (2024) • City Manager (2020) • Deputy Planning and Development Director (2013) • Finance Director (2010) 	Mike Heyeck, Council Chairperson P: 614.901.6400 E: michael.heyeck@westerville.org

RECRUITMENT TEAM

Recruitment Team

WE HAVE DEVELOPED A TEAM OF CONSULTANTS WHO SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF THE CITY'S RECRUITMENT.

Our team includes senior-level professionals to provide experienced project leadership with support from talented consultant staff. This close-knit group has frequently collaborated on similar successful recruitments, providing the City with confidence in our capabilities. On the following pages, we have included resumes for each of our recruiting team members.



Catherine Tuck Parrish

PROJECT DIRECTOR/LEAD RECRUITER

Vice President

PROFILE

Catherine has 30 years of management experience working for local governments of all sizes, nonprofit organizations, and associations. She leads the firm's executive search practice and has conducted over 160 searches for managers/administrators; police chiefs; fire chiefs; directors of public works, planning, economic development, finance, human resources, and human services; and other key positions in local governments across the country.

In addition to executive recruitment, she has facilitated numerous governing body workshops, staff retreats, and strategic planning sessions. Her work as a consultant includes project management and contributions to several local government projects, such as process improvement studies, departmental assessments, planning and permitting process reviews, and policy development.

Catherine's most recent local government experience was as deputy city manager in Rockville, Maryland, where she oversaw parks and recreation, human resources, information technology, finance, neighborhood resources (citizen engagement), communications, customer service, and intergovernmental functions. She also served as acting city manager in Rockville for nearly a year. Before joining Rockville, Catherine served as assistant to the county executive in Fairfax County, Virginia, working on change management issues, including a new pay system, employee surveys, implementation plans, and internal communication improvements. Catherine has served as an ethics advisor at the International City/County Management Association (ICMA), counseling elected officials and citizen groups regarding employment agreements, forms of government issues, and recruitment. She also worked for the City of Denton, Texas.

She chaired the ICMA's Acting Manager Task Force, which produced a handbook for interim managers. She also led the Maryland City/County Management Association (MCCMA) as president and vice president. She served as president, vice president, and secretary of the Metropolitan Association of Local Government Assistants in the Washington, D.C. metro area. Catherine has spoken at national and state conferences on a variety of topics, including recruitment trends, civility, effective councils, ethics, forms of government, human resources, long-term financial planning, budget strategies, developing high-performing organizations, and leadership. She has also spoken at the National League of Cities Leadership Training Institute on recruiting and evaluating the CEO. She is a certified instructor of the Myers-Briggs Type Indicator instrument.



Specialties

- Executive search
- Strategic planning
- Facilitation
- Strategy development and implementation
- Community engagement
- Employee engagement

Professional History

- Raftelis: Vice President (2021-present); Senior Manager (2020-2021); Executive Search Practice Leader, The Novak Consulting Group (2010-2020)
- Management Partners: Senior Manager (2009-2010)
- City of Rockville, Maryland: Deputy City Manager/Acting City Manager/Assistant City Manager (2001-2009)
- Fairfax County, Virginia: Assistant to the County Executive (1998-2001)
- ICMA: Ethics Advisor/ Senior Local Government Programs Manager (1994-1998)
- City of Denton, Texas: Administrative Assistant to the City Manager (1990-1994)

Education

- Master of Public Administration - University of Kansas (1990)
- Bachelor of Arts in Communication Studies/Personnel Administration - University of Kansas (1988)

Professional Memberships

- International City/County Management Association (ICMA)
- Engaging Local Government Leaders (ELGL)
- Maryland City/County Management Association (MCCMA)

Heather Gantz

RECRUITER Senior Manager

PROFILE

Heather has over 20 years of leadership experience in recruiting, talent acquisition, and executive search, with the last 15 years focused on local government. She leads executive searches for the firm, where she is known for her thoroughness as well as engendering trusting relationships with both the client and candidate while providing exceptional customer service throughout the process.

Heather has conducted over 75 searches in the public sector. She has delivered positive search outcomes for dozens of high-profile public organizations and is an expert at guiding strategy and tailoring outreach to find even the most niche candidates. Heather has successfully recruited for city and county managers and administrators, deputy and assistant managers, human resources, finance, community and economic development, public safety, parks and recreation, public works, and many more local government professionals. In addition, she has led numerous executive-level searches in the social/nonprofit sector and recruited leadership positions for technology, creative, accounting, and finance professionals in the private sector.

In addition to executive recruitment, Heather has experience supporting organizational effectiveness. She is known for providing effective leadership development and contributing to employee growth and development initiatives. Heather has advised individuals and small groups on career transition and job search strategies. Topics include knowledge and skill assessment, resume development, LinkedIn, networking, interview preparation, and salary and offer negotiation. Heather has also completed several leadership evaluations and performance reviews for local government leaders.

Heather has a passion for supporting diversity and innovation in the public sector. She served as an early Advisory Board Member for ELGL and remains an active and involved member in support of their mission of engaging the brightest minds in local government. In addition, Heather has served as a recurring speaker and presenter at the Northwest Women's Leadership Academy (NWWLA) in support of advancing women into leadership roles from a variety of backgrounds in local government.



Specialties

- Executive Search
- Leadership Development
- Employee Growth and Development
- Innovation
- Facilitation
- Project Management
- Community Engagement
- Diversity of Thought

Professional History

- Raftelis: Senior Manager (2022-present); Manager (2020 – 2021)
- Waldron: Director (2007-2020)
- Private Sector Recruiter (1996-2007)

Education

- Bachelor of Arts in Business Management - University of Phoenix (2000)

Professional Memberships

- Engaging Local Government Leaders (ELGL)

Pamela J. Wideman

RECRUITER Senior Manager

PROFILE

Pamela has over 25 years of experience in leading local government teams, with the last 10 years in executive leadership with the City of Charlotte. She is adept at forging creative solutions to government and community issues at the local level, with service to the community as the foundation of her leadership style. She is known for her thoroughness as well as engendering trusting relationships with elected officials, executive leadership across public, private, and non-profit organizations, and residents, all while providing exceptional customer service throughout the process.

Pamela most recently served as the Director of the City of Charlotte's Housing & Neighborhood Services Department, leading a team of over 200 staff across five key divisions. Pamela shaped Charlotte's affordable housing landscape and managed the oversight of millions of public dollars. She helped create and preserve over 5,000 affordable housing units, created and successfully deployed COVID-19 Pandemic relief programs for rent, mortgage, utility, and deposit assistance to keep vulnerable residents housed during the pandemic, developed a new local rental subsidy program, and managed over \$68 million in homelessness support and prevention.

During her work there, Pamela hired numerous staff members for her Department and participated on executive search panels for positions both with the City of Charlotte as well as with other municipalities and organizations. Pamela is a highly sought-after speaker for her expertise in affordable housing and has spoken on numerous panels across the country. Pamela strongly believes that "service is the rent we pay for living on this earth" and is often asked to share her public sector experiences with students, professional trade organizations, and local municipalities.

Pamela has a passion for developing and implementing solutions that serve the community. She served as an early Advisory Member for the Greenlight Fund in Charlotte, and on the Mayors and CEOs Committee for U.S. Housing Investment. Pamela was awarded the Master of Public Administration Alumna of the Year and received a Leadership in Black Excellence from her alma mater, the University of North Carolina – Charlotte. She was also recognized as a Women's In Leadership Champion by the Charlotte Chapter of the Urban Land Institute. Additionally, she was recognized as one of the top 10 "Behind the Scenes" newsmakers by the Charlotte Business Journal in both 2017 and 2020. She currently serves on the Board of Directors for the United Way of Greater Charlotte and the Children and Family Services Center. She is a member of the International City/County Management Association and the National Forum for Black Public Administrators.



Specialties

- Executive Level Management
- Hiring and Recruitment
- Affordable Housing Expertise
- Community Development Policy and Program Development
- Team Development & Leadership
- Consensus Building
- Community Engagement
- Budget Management

Professional History

- Raftelis: Manager (2021 – Present)
- City of Charlotte: Director of Housing & Neighborhood Services (2017 – 2021)
- City of Charlotte: Housing & Neighborhood Services Deputy Director (2008 – 2016)
- City of Charlotte: Housing & Neighborhood Services Supervisor (2006 – 2008)
- City of Charlotte: Budget Analyst (2003 – 2006)

Education

- Harvard Kennedy School -Senior Executives in State and Local Government (2015)
- UNC-Chapel Hill - Municipal Administration (2007)
- University of North Carolina at Charlotte- Master's in Public Administration (2006)
- Belmont Abbey College -Bachelor of Arts in Business Administration (1999)

Professional Memberships

- International City/County Managers Association
- Urban Land Institute
- National Forum for Black Public Administrators

Robert Colichio

RECRUITMENT SPECIALIST

Senior Consultant

PROFILE

Robert has over 10 years of experience in full lifecycle recruiting, sourcing, interviewing, and professional coaching. As a recruiter, Robert has engaged in searches within both the public and social sectors. He has successfully worked on recruitments for city and county managers and administrators, deputy and assistant managers, and various director and managerial roles in human resources, finance, community and economic development, public safety, parks and recreation, and public works.

In addition to executive recruiting, Robert has over eight years of combined experience in professional development, career coaching, and career transition management. With over 500 clients served, leading and coaching them through complicated organizational changes ranging from individual executive employee transitions to large reductions in force. Work with these clients often includes one-on-one coaching over the course of multiple months. Robert additionally hosted and developed multiple large group workshops for companies. He has extensive and diverse project management experience, including technology changes and implementations.

Robert has a Master of Business Administration degree with an emphasis in organizational behavior and a Bachelor of Science in Business Administration with dual concentrations in operational management and marketing with a minor in economics.



Specialties

- Executive search
- Project management
- Facilitation
- Employee growth and development
- Data analysis

Professional History

- Raftelis: Senior Consultant (2023-present); Consultant (2021-2022)
- Waldron: Senior Consultant and Coach (2013-2021)
- Portland State University: Graduate Teaching Assistant (2010-2012)
- Private Sector Consultant: Strategic Planning and Marketing Development (2008-2012)
- Skanska USA: Project and Client Relations Coordinator (2006-2008)

Education

- Master of Business Administration in Organizational Behavior - Portland State University, School of Business (2012)
- Bachelor of Science in Business Administration - University of Oregon, Lundquist College of Business (2006)

Certifications

- SHRM-CP

Professional Memberships

- Society for Human Resource Management (SHRM)

Kelsey Batt

RECRUITMENT SPECIALIST Consultant

PROFILE

Kelsey joined Raftelis in 2021, helping to facilitate executive level recruitments for local governments across the county. As a strong cross-cultural communicator, Kelsey utilizes her skills and background in professional writing to serve as a launchpad for all her endeavors.

Kelsey graduated from the Honors College at Purdue University in West Lafayette, Indiana where she earned a bachelor's in both Professional Writing and Creative Writing, as well as a Minor in Italian.

During her time as a student, Kelsey worked diligently at the world-renowned Purdue OWL Writing Lab, pairing with over 1,000 undergraduate and graduate students to help develop positive relationships with both writing and the English language. She also competed on the women's Division I Track and Field and Cross-Country teams while at Purdue, earning six Academic All-Conference Honors from the Big Ten.

She has previously worked as a copywriter at Sweetwater Sound where she developed the company's first Copy Style Guide and proposed several researched marketing strategies, focusing on inclusion amidst gender inequality in the music industry. Her ideas can be seen implemented throughout their current sales website and internally. Kelsey also has experience in marketing from her time at SDI Innovations, where she produced and edited social media and blog content.



Specialties

- Executive search
- Recruiting
- Editing

Professional History

- Raftelis: Consultant (2024-present); Associate Consultant (2021-2023)
- The Purdue Writing Lab & Purdue OWL (2017-2021)

Education

- Bachelor of Arts, School of Liberal Arts – Purdue University, West Lafayette, IN (2021)

Alexa Worrell

RECRUITMENT SPECIALIST

Consultant

PROFILE

In May 2022, Alexa joined Raftelis as a recruitment specialist, having completed an internship with the firm's Executive Recruitment Team where she supported numerous search activities.

Prior to Raftelis, Alexa worked as a Talent Generalist Intern at Textron Specialized Vehicles, where she developed a comprehensive leave process guide to ensure more consistent application of the company's policies; researched human resource procedures, policies, and applicable employment laws; and marketed and facilitated an informational event for employees to set up banking needs.

Through her prior work as a Receptionist/HR Assistant, Alexa developed her interviewing and recruiting skills and gained experience in redesigning training manuals for various roles to enhance training processes for future hires.

During her time as a student, Alexa served as recruitment chair of her sorority, where she recruited a new incoming class of over 30 members while also developing positive relationships with the new class and the established members of the chapter. She also assisted with facilitating monthly business development events as a member coordinator for the Advancing Women in Entrepreneurship Business Club.

Alexa earned her bachelor's degree in Sociology and Human Capital Leadership and Management from Miami University in Oxford, Ohio.



Specialties

- Executive search
- Recruiting
- Relationship building

Professional History

- Raftelis: Consultant (2024-present); Associate Consultant (2022-2023)
- Textron Specialized Vehicles: Talent Generalist (2021-2021)

Education

- Bachelor of Arts, School of Liberal Arts – Miami University, Oxford, OH (2021)

COST

Cost

The total fixed fee to complete the Internal Auditor recruitment, as outlined in this proposal, is \$33,400. This includes all professional fees and expenses for Raftelis.

We estimate the following additional costs to the City, which would be billed at cost.

Additional Meetings with City Commission	Airfare, hotel, and per diem
Advertising	Approximately \$2,000-\$2,500
Background checks	Estimated at \$175-\$500/finalist
Finalists' interview travel	Borne and reimbursed directly to the finalists by the City

Advertising and background checks are invoiced as completed. The fixed fee will be invoiced as follows:

Activity 1 – \$8,955	After delivery of the recruitment documents <ul style="list-style-type: none"> • Recruitment plan • Recruitment brochure • First-year goals
Activity 2 – \$14,610	After the candidate review
Activity 3 – \$9,835	After the interviews are completed

Within six (6) months of the final interview process, should an additional candidate be hired by the City from the pool of candidates presented by Raftelis for this project, the additional fee shall be \$15,000.

ADDITIONAL SERVICES

Coaching

Raftelis has trained coaches with practical experience as former practitioners to provide one-on-one coaching with executives, department heads, and mid-level managers. The process includes setting goals, the development and execution of a coaching plan, and individual coaching sessions. Local governments and utilities utilize this service to help new leaders acclimate to new roles and responsibilities, adjust to the complexities of the organization and external factors, navigate difficult conversations, improve their interactions with the governing body and/or in public settings, build strong staff teams, and prepare future leadership within the organization.

COST:

- Typical cost for this service is \$10,000
- Hourly rate for coaches is \$250/hour
- Work is done virtually

Facilitated Evaluations

Raftelis has skilled staff who can deliver a facilitated evaluation for governing-body appointed staff, including city managers, city attorneys, city clerks, city treasurers, city auditors, etc. This process includes input from every governing body member through the facilitator, self-assessment, a guided conversation in executive session, goal-setting for the next year, and the evaluation document. This allows each member of the governing body's voice to be included, ensures the executive receives meaningful feedback, and is done objectively. This process may also include a 360 component, if desired.

COST:

- Typical cost for this service is \$13,000 to \$17,000 (depending on scope, such as the inclusion of 360)
- Work is done remotely except for guided executive session

APPENDIX: ADDITIONAL RELEVANT EXPERIENCE

Appendix: Additional Relevant Experience



Recent Executive Search Experience

Client	Position
AZ Central Arizona Project	General Manager
AZ Clarkdale	Town Manager
AZ Cottonwood	City Manager
AZ Oro Valley	Chief Financial Officer
AZ Oro Valley	Police Chief
AZ Payson	Town Manager
AZ Peoria	Human Resources Director
AZ Scottsdale	Economic Development Director
AZ Yuma	City Administrator
AZ Yuma	Engineering Director
AZ Yuma	Finance Director
AZ Yuma	Planning and Neighborhood Services Director
CO Aspen	Community Development Director
CO Boulder	Chief Human Resources Officer
CO Boulder	City Attorney
CO Boulder	City Manager
CO Boulder	Fire Division Chief
CO Boulder	HRIS Manager
CO Boulder	Human Resources Director
CO Boulder	Human Resources Senior Manager
CO Boulder	Independent Police Monitor
CO Boulder	Municipal Court Judge
CO Boulder	Planning and Development Services Director
CO Boulder	Total Rewards Senior Manager
CO Boulder	Utilities Engineering Manager
CO Denver	Independent Monitor
CO Fort Collins	Cultural Services Director
CO Fort Collins	Deputy City Manager

Client	Position
CO Fort Collins	Community Services Director
CO Fort Collins	Community Development and Neighborhood Services Director
CO Fort Collins	Environmental Services Director
CO Fort Collins	Natural Areas Director
CO Fort Collins	Recreation Director
CO Fort Collins	Utilities Executive Director
CO Health District of Northern Larimer County	Executive Director
CO Lafayette	City Administrator
CO Louisville	City Manager
CO Louisville	Director of Parks and Recreation
CO Louisville	Director of Planning and Building Safety
CO Louisville	Human Resources Director
CO Loveland	Budget Manager*
CO Loveland	Chief Financial Officer*
CO Loveland	City Clerk*
CO Loveland	Economic Development Director*
CO Northglenn	Human Resources Director
CO Pueblo West Metropolitan District	District Manager
CO Westminster	Parks, Recreation, and Library Director
CT Greenwich	Town Administrator
CT Mansfield	Town Manager
CT Meriden	City Manager
CT Windsor	Police Chief
DE Kent County	County Engineer/Public Works Director
DE Lewes	Municipal Planning and Development Officer
DE Milford	City Manager
DE Milton	Town Manager
DE Rehoboth Beach	City Manager

Client	Position
IA Cedar Rapids	Utilities Director
IA Cedar Rapids	City Attorney
IA Cedar Rapids	Public Works Director
IL Peoria County	Director, Animal Protection Services
IN Bloomington	Traffic and Transportation Engineer
KS Baldwin City	City Administrative Officer
KS Edgerton	Building Inspector
KS Edgerton	Community Development Director
KS Johnson County	Human Resources Director
KS Merriam	Finance Director
KS Olathe	Director of Economy
KS Tonganoxie	City Manager
LA Orleans Parish School Board	Chief Operations Officer
MD Aberdeen	Director of APG Privatization
MD Aberdeen	Police Chief
MD Aberdeen	Public Works Director
MD Berwyn Heights	Code Supervisor
MD Berwyn Heights	Town Administrator
MD Cambridge	City Manager
MD Charles County	Director of Community Services*
MD Charles County	Engineer IV*
MD Gaithersburg	City Manager
MD Gaithersburg	Director of Finance and Administration
MD Gaithersburg	Engineering Services Division Chief
MD Gaithersburg	Finance Director
MD Gaithersburg	Public Works Director
MD Gaithersburg	Public Works and Engineering Director
MD Gaithersburg	Director of Information Technology

Client	Position
MD Garrett Park	Town Manager
MD La Plata	Planning Director
MD La Plata	Police Chief
MD La Plata	Town Manager
MD La Plata	Town Treasurer
MD Maryland Municipal League	Executive Director/CEO
MD Mount Rainier	City Manager
MD New Carrollton	City Administrative Officer
MD Ocean Pines Association	General Manager
MD Riverdale Park	Town Manager
MD Riverdale Park	Police Chief
MD Rockville	City Attorney
MD Rockville	City Manager
MD Rockville	Community Planning and Development Services Director
MD St. Michaels	Town Administrator
MD Sykesville	Town Manager
MD Takoma Park	City Manager
MD Takoma Park	Deputy City Manager*
MD Westminster	Finance Director
MD Westminster	Human Resources Director
MI Novi	Assistant City Manager
MI Novi	Finance Director
MI Rochester Hills	Chief Financial Officer
MO Chesterfield	City Administrator
MO Clayton	City Manager
MO Lee's Summit	Human Resources Director
MT Helena	City Manager
NC Guilford County	Assistant County Manager for Strong Communities

Client	Position
NC Guilford County	Assistant County Manager for Successful People
NC Guilford County	County Attorney
NC Guilford County	Communications and Public Relations Director
NC Guilford County	Deputy Finance Director
NC Guilford County	Equity and Inclusion Manager
NC Guilford County	Public Relations Director
NC High Point	Assistant City Manager
NC High Point	Planning Director
NC Matthews	Assistant Town Manager
NC Rolesville	Human Resources Director
NH Keene	City Manager
NH Hanover	Town Manager
NM Las Cruces	City Manager
NY Batavia	City Manager
NY Livingston County Water and Sewer Authority (LCWSA)	Executive Director
NY Oneonta	City Manager
OH Centerville	City Manager
OH Delaware County	Director of Economic Development
OH Delaware County Transit District	Executive Director
OH Hilliard	Deputy Police Chief
OH Hilliard	Police Chief
OH Hudson	City Manager
OH Cleveland Heights	City Manager
OH Cleveland Heights	Finance Director
OH Dayton	Financial Officer
OH Dublin	Director of Public Service
OH Dublin	Deputy City Manager/ Chief Operations Officer
OH Granville	Village Manager

Client	Position
OH Hilliard	City Manager
OH Hudson	City Manager
OH Jackson Township	Township Administrator
OH Miami Township	Township Administrator
OH Moraine	City Manager
OH Oberlin	Fire Chief
OH Oberlin	Police Chief
OH Portsmouth	City Manager
OH Prairie Township	Township Administrator
OH Sandusky	City Manager
OH Solid Waste Authority of Central Ohio (SWACO)	Director of Administration
OH The Port - an Ohio Port Authority	General Counsel
OH The Port - an Ohio Port Authority	Industrial Development Manager
OH The Port - an Ohio Port Authority	Vice President of Communications and Marketing
OH The Port - an Ohio Port Authority	Vice President of Economic Equity
OH Union County	County Administrator
OH Upper Arlington	Assistant City Manager*
OH Upper Arlington	Police Chief
OH Washington Township	Assistant Fire Chief
OH Washington Township	Township Administrator
OH West Chester Township	Township Administrator
OH Westerville	City Manager
OH Westerville	Deputy Director of Planning and Development
OH Westerville	Finance Director
OH Worthington	Assistant Fire Chief
OH Wyoming	City Manager
OR Beaverton	City Manager
OR Beaverton	Finance Director

Client	Position	
OR	Beaverton	Interim City Manager
OR	Beaverton	Police Chief
OR	Beaverton	Public Works Director
OR	Clean Water Services	Chief of Staff
OR	Clean Water Services	Chief Utility Operations Officer
OR	Clean Water Services	General Counsel and Chief Compliance Officer
OR	Gresham	City Manager
OR	Gresham	Police Chief
OR	Hillsboro	Employee and Labor Relations Manager
OR	Hillsboro	Library Director
OR	Lake Oswego	City Attorney
OR	Lane County	Public Works Director
OR	Newberg	Assistant City Manager
OR	Newburg	Police Chief
OR	Newberg	Public Works Director
OR	Salem	City Manager
OR	Scappoose	Finance Administrator
OR	Sunrise Water Authority	Finance Director
OR	Tigard	Assistant City Manager
OR	Tigard	Finance Director
OR	Tigard	Human Resources Director
OR	Tualatin	City Attorney
OR	Tualatin Hills Park & Recreation District	Chief Financial Officer
OR	Tualatin Hills Park & Recreation District	City Attorney
OR	Tualatin Hills Park & Recreation District	District Finance Director
OR	Washington County	County Administrator
OR	Washington County	Interim County Administrator
OR	Washington County	Chief Financial Officer
OR	Washington County	County Counsel

Client	Position	
OR	Washington County	Assistant County Administrators
PA	Breakneck Creek Regional Authority	Manager
PA	Carlisle Borough	Police Chief
PA	Farrell	City Manager
SC	Mount Pleasant Waterworks	General Manager
TX	Abilene	City Engineer
TX	Abilene	Library Director
TX	Lancaster	Assistant City Manager
TX	Lancaster	Finance Director
TX	University Park	Human Resources Director
VA	Albemarle County	Chief Financial Officer
VA	Albemarle County	County Attorney
VA	Albemarle County	Deputy Director of Community Development
VA	Albemarle County	Police Chief
VA	Albemarle County	DEI Director
VA	Albemarle County	Deputy Chief Financial Officer
VA	Albemarle County	Diversity, Equity, and Inclusion Director
VA	Albemarle County	Human Resources Director
VA	Alexandria	Controller
VA	Arlington County	Central Library Services Division Chief*
VA	Arlington County	Housing Director*
VA	Ashland	Town Manager
VA	Bedford County	County Administrator
VA	Bedford County	Deputy Fire Chief*
VA	Bedford County	Finance Director
VA	Chesapeake	Chief Financial Officer
VA	Chesapeake	Chief Information Officer
VA	Chesapeake	City Auditor
VA	Fairfax	City Manager

Client	Position
VA Fairfax	Police Chief
VA Fairfax County	County Executive
VA Fairfax County	Deputy County Executive
VA Fairfax Water	Customer Service Manager
VA Fairfax Water	Human Resources Manager
VA Fredericksburg	Public Works Director
VA Harrisonburg	City Manager
VA Harrisonburg	Human Resources Director
VA Harrisonburg	Police Chief
VA Harrisonburg-Rockingham Regional Sewer Authority (HRRSA)	Executive Director
VA Leesburg	Finance Director
VA Leesburg	Town Attorney
VA Leesburg	Planning and Zoning Director
VA Loudoun County	Animal Services Director
VA Loudoun County	Assistant County Administrator
VA Loudoun County	Assistant Director of Human Resources
VA Loudoun County	Chief Financial Officer
VA Loudoun County	County Attorney
VA Loudoun County	Director of Building and Development
VA Loudoun County	Deputy County Administrator
VA Loudoun County	Economic Development Director
VA Loudoun County	Family Services Director
VA Loudoun County	Finance Director
VA Loudoun County	Housing and Community Development Director
VA Loudoun County	Information Technology Director
VA Loudoun County	Mapping and Geographic Information Director
VA Loudoun County	Mental Health, Substance Abuse, and Developmental Services Director
VA Loudoun County	Parks, Recreation, and Community Services Director

Client	Position
VA Loudoun County	Planning and Zoning Director
VA Loudoun County	Systemwide Fire Chief
VA Loudoun County	Community Corrections Director
VA Newport News	Engineering Director
VA Newport News	Waterworks Director
VA Newport News	Human Resources Director
VA Prince William County	Deputy County Executive for Public Safety
VA Virginia Retirement System	Human Resources Director
VA Warrenton	Town Manager
WA Bellevue	Assistant Director, Financial and Resource Management
WA Bellevue	Deputy City Manager
WA Bellevue	Utilities Deputy Director
WA Bothell	City Manager
WA Bothell	Community Development Director
WA Bothell	Finance Director
WA Camas	City Administrator
WA Central Pierce Fire and Rescue	Fire Chief
WA Sammamish	Public Works Director
WA Shoreline	Administrative Services Director
WA Shoreline	City Manager
WA Shoreline	Human Resources and Organizational Development Director
WA Shoreline	Human Resources Director
WA Spokane Regional Health District	Community Health Director
WA Spokane Regional Health District	Deputy Administrative Officer
WA Spokane Regional Health District	Health Officer
WA Spokane Regional Health District	Human Resources Manager
WI Central Brown County Water Authority	Manager
WI Mequon	City Administrator
WV Morgantown	City Manager