



**Purchase Order
No. 2024-00000185**

DATE 03/22/2024

Ph. (970) 244-1545

Fax (970) 256-4022

Ship To
City of Grand Junction
250 N. 5th St., Suite 232
GRAND JUNCTION, CO 81501

Bill To
City of Grand Junction
250 N. 5th St., Suite 232
GRAND JUNCTION, CO 81501

Vendor
VENDOR NO.7174
Raftelis Financial Consultants Inc
ACH
227 W Trade Street Suite 1400
Charlotte, NC 28202
Phone: (704) 910-8194

PAGE 1 of 1
SHIP VIA
DELIVER BY 07/31/2024
FREIGHT TERMS
Payment Terms: Net 30 Days
Buyer Name: Duane G. Hoff Jr.
Buyer Email: duaneh@gjcity.org

Contract award #5423-24-DH

QUANTITY	UNIT	DESCRIPTION	UNIT COST	TOTAL COST
1.0000	Lump Su	CONTRACT SERVICES - Executive Search Services - City Manager 100-110-010.7410 - Contract Svcs 35,500.00	35,500.0000	\$35,500.00
PURCHASE ORDER TOTAL				\$35,500.00

Special Instructions: PURCHASE ORDER No. MUST APPEAR ON ALL INVOICES, SHIPPERS, PACKAGES, CORRESPONDENCE
Tax Exempt No. 98-03544

By: 



CITY OF GRAND JUNCTION, COLORADO

CONTRACT

This CONTRACT made and entered into this 26th day of March 2024 by and between the **City of Grand Junction**, Colorado, a government entity in the County of Mesa, State of Colorado, hereinafter in the Contract Documents referred to as the "Owner" and **Raftelis Financial Consultants, Inc.**, hereinafter in the Contract Documents referred to as the "Firm."

WITNESSETH:

WHEREAS the Owner received a comprehensive price proposal from the Firm encompassing all that is required for the provision of the Service(s) delineated within the Contract Documents, referred to herein as the **Executive Search Services – City Manager #5423-24-DH**.

WHEREAS, the Contract has been awarded to the above-named Firm by the Owner and said Firm is now ready, willing, and able to provide the Service(s) specified under the Contract Documents.

NOW, THEREFORE, in consideration of the compensation to be paid to the Firm, the mutual covenants hereinafter set forth and subject to the terms hereinafter stated, it is mutually covenanted and agreed as follows:

ARTICLE 1

Contract Documents: It is agreed by the Parties hereto that the following list of instruments, and documents which are attached hereto, bound herewith, or incorporated herein by reference constitute and shall be referred to either as the "Contract Documents" or the "Contract", and all of the said instruments, and documents taken together as a whole constitute the Contract between the Parties hereto, and they are fully a part of this agreement as if they were set out verbatim and in full herein:

The order of contract document governance shall be as follows:

- a. The body of this Contract Agreement;
- b. Owner's General Terms and Conditions #5423-24-DH;
- c. Firm's price proposal;
- d. Service Change Requests (directing changed service(s) to be performed);
- e. Field Orders;
- f. Change Orders.

ARTICLE 2

Definitions: The Owner's General Terms and Conditions apply to the terms used in the Contract and the Contract Documents.

ARTICLE 3

Contract Service(s): The Firm agrees to furnish all professional fees, labor costs, development of profiles, placement of advertisements and job postings, targeted outreach to passive candidates, screening process and internet search, support interviews, and selection procedures, as well as any incidental expenses necessary and required to complete the tasks associated with the Service(s) described, set forth, shown, and included in the Contract Documents.

ARTICLE 4

Contract Time: Adherence to the timeline is imperative for the fulfillment of this Contract. The Firm hereby commits to initiating the provision of the Service(s) stipulated herein upon the full execution of this Contract and undertakes to complete and deliver the Service(s) with the timeframes delineated in the Firm's price proposal.

ARTICLE 5

Contract Price and Payment Procedures: The Firm shall accept as full and complete compensation for the performance and completion of all of the Service(s) specified in the Contract Documents, the sum of **Thirty-Five Thousand Five Hundred and 00/100 Dollars (\$35,500.00)**. The amount of the Contract Price is and has heretofore been appropriated by the Grand Junction City Council for the use and benefit of this Project. The Contract Price shall not be modified except by Change Order or another written directive of the Owner. The Owner shall not issue a Change Order or other written directive that requires additional services to be performed, which services cause the aggregate amount payable under this Contract to exceed the amount appropriated for this Project, unless and until the Owner provides the Firm written assurance that lawful appropriations to cover the costs of the additional services have been made.

ARTICLE 6

Contract Binding: The Owner and the Firm each bind itself, its partners, successors, assigns, and legal representatives to the other party hereto in respect of all covenants, agreements, and obligations contained in the Contract Documents. The Contract Documents constitute the entire agreement between the Owner and Firm and may only be altered, amended, or repealed by a duly executed written instrument. Neither the Owner nor the Firm shall, without the prior written consent of the other, assign or sublet in whole or in part its interest under any of the Contract Documents. Specifically, the Firm shall not assign any monies due or to become due without the prior written consent of the Owner.



Executive Search Services – City Manager #5347-23-KF

Section 1.0. General Contract Terms and Conditions

- 1.1. The Owner:** The City is the “Owner” that will act by and through its authorized representative(s); “Owner” or “City” may be used interchangeably throughout this document.
- 1.2. Compliance:** The Firm with its price proposal and signature hereunder, commits to adhere to all conditions, requirements, and instructions as stated or implied herein. Should the Owner omit anything necessary to the clear understanding of the requirements from this packet, or should it appear that various instructions conflict, the Firm(s) shall secure instructions from the Purchasing Division.
- 1.3. Controlling Authority:** The 2023 version of the City [Procurement Policy](#) is controlling.
- 1.4. Public Disclosure:** Under the Colorado Open Records Act (CORA), all information within any proposal is subject to public disclosure. Upon the issuance of an award, both the negotiation file and the proposal(s) contained therein are subject to a [CORA request](#). In instances of Solicitation or Project cancellation, public disclosure is contingent upon adherence to pertinent laws.
- 1.5. Sales Taxes:** The Owner is exempt from State, County, and Municipal Taxes and Federal Excise Tax; therefore, all fees shall not include taxes.
- 1.6. The Contract:** The Firm's proposal, submitted documents, and any negotiations, when properly accepted by the Owner, shall constitute an enforceable Agreement (Contract) equally binding between the Owner and Firm. The Contract represents the entire and integrated agreement between the Owner and the Firm, collectively the Parties, and supersedes all prior negotiations, representations, or agreements, either written or oral. The Contract may be amended or modified with a Change Order or an Amendment.
- 1.7. Execution, Correlation, Intent, and Interpretations:** The Contract Document(s) shall be signed by the Owner and the Firm. By executing the Contract, the Firm represents that it has familiarized itself with the conditions under which the Service is to be performed and correlated its observations with the requirements of the Contract Documents. The Contract Documents are complementary, and what is required by anyone, shall be as binding as if required by all. The Contract Documents intend to include all aspects of manufacturing, materials, hardware, and other items necessary for the proper execution and completion of the specifications contained herein.
- 1.8. Responsibility for those Performing the Service(s):** The Firm shall be responsible to the Owner for the act(s) and omission(s) of all its employees and all other persons performing any of the Service(s) under a contract with the Firm.
- 1.9. Indemnification:** The Firm shall defend, indemnify, and save harmless the Owner, and all its officers, and employees, from and against liability, suits, actions, or other claims

brought for or on account of any injuries or damages received or sustained by any person, persons, or property to the extent caused by negligent act or fault of the Firm, or of any Firm's employee, a subcontractor in the execution of, or performance under, any Contract which may result from price proposal award. The Firm shall assume the obligation to satisfy any judgment(s), including associated costs, obtained by and/or against the Owner to the extent indemnified hereunder).

- 1.10. Payment & Completion:** The Contract Sum, as stated in the Contract, represents the total amount payable by the Owner to the Firm for execution of the Service(s) as outlined in the Contract Document(s). Before payment the Owner shall confirm that the contractual obligations have been satisfactorily fulfilled, and the Owner shall remit payment as outlined in the Contract Document(s). It is incumbent upon the Firm to conduct its services following the generally accepted professional practices, and standards, consistent with the prevailing level of proficiency maintained by comparable professional entities within the relevant community. Furthermore, all Services rendered by the Firm must adhere strictly to pertinent laws, ordinances, rules, and regulations.
- 1.11. Changes in the Service(s):** The Owner, without invalidating the Contract, may request changes in the Service(s) within the general scope of the Contract consisting of additions, deletions, or other revisions, the Contract sum, and the Contract time being adjusted accordingly. All such changes in the Service shall be authorized by Change Order and shall be executed under the applicable conditions of the Contract documents. A Change Order is a written order to the Firm signed by the Parties issued after the execution of the Contract, authorizing a change in the Service or an adjustment in the Contract sum or the Contract time. The Contract sum and the Contract time may be changed only by Change Order.
- 1.12. Minor Changes in the Service(s):** The Owner shall have the authority to order minor changes in the Service(s) not involving an adjustment in the Contract sum or an extension of the contract time and not inconsistent with the intent of the Contract Documents.
- 1.13. Acceptance Not Waiver:** The Owner's acceptance or approval of any Service(s) provided herein shall not in any way relieve the Firm of its ongoing obligation to uphold the requisite standards of quality, integrity, and timeliness of its services. The Owner's approval or acceptance of, or remittance of payment for any service(s) shall not be construed as a future waiver of any rights under this Contract, nor shall it constitute a waiver of any potential claims arising from the performance under this Contract.
- 1.14. Change Order/Amendment:** No oral statement of any person shall modify or otherwise change, or affect the terms, conditions, or specifications stated in the resulting Contract. All amendments to the Contract shall be made in writing by the City Contract Administrator.
- 1.15. Assignment:** The Firm shall not sell, assign, transfer, or convey the Contract resulting from this negotiation, in whole or in part, without prior written approval from the Owner.
- 1.16. Compliance with Laws:** The Firm must comply with all applicable federal and state laws applicable to the Services. The Firm hereby warrants that it is qualified to assume the responsibilities and render the Services described herein and has all requisite corporate

authority, skills credentials, experience, and professional licenses in good standing as required by law.

- 1.17. Confidentiality:** Any information furnished by the Owner to the Firm to facilitate the Service(s) or any information acquired by the Firm during the course of executing the Service(s) stated herein shall be held under strict confidence.
- 1.18. Conflict of Interest:** No public official and/or Owner employee will have interest in the Contract resulting from this negotiation.
- 1.19. Contract Termination:** The Contract shall remain in effect until any of the following occurs: (1) Contract expires; (2) Service(s) are delivered complete and final acceptance by the Owner or, (3) for convenience terminated by either party with a written *Notice of Cancellation* stating therein the reasons for such cancellation and the effective date of cancellation at least thirty (30) days past notification.
- 1.20. Employment Discrimination:** During the performance of any Service(s), the Firm agrees to:
 - 1.20.1.** Not discriminate against any employee or applicant for employment because of race, religion, color, sex, age, disability, citizenship status, marital status, veteran status, sexual orientation, national origin, or any legally protected status except when such condition is a legitimate occupational qualification reasonably necessary for the normal operations of the Firm. The Firm agrees to post in conspicuous places, visible to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - 1.20.2.** In all solicitations or advertisements for employees placed by or on behalf of the Firm, the Firm asserts that it is an Equal Opportunity Employer.
 - 1.20.3.** Notices, advertisements, and solicitations placed per federal law, rule, or regulation shall be deemed sufficient for meeting the requirements of this section.
- 1.21. Affirmative Action:** In executing a Contract with the City, the Firm agrees to comply with Affirmative Action and Equal Employment Opportunity regulations, as mandated by applicable federal, state, and local laws.
- 1.22. Immigration Reform and Control Act of 1986 and Immigration Compliance:** The Firm certifies that it does not and will not during the performance of the Contract employ workers without authorization or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986 and/or laws regulating immigration compliance.
- 1.23. Ethics:** The Firm shall not accept or offer gifts or anything of value and/or enter into any business arrangement with any employee, official, or agent of the Owner.
- 1.24. Failure to Enforce:** Failure by the Owner at any time to enforce the provisions of the Contract shall not be construed as a waiver of any such provisions. Such failure to enforce

shall not affect the validity of the Contract or any part thereof or the right of the Owner to enforce any provision of the Contract Documents at any time under the terms thereof.

- 1.25. Force Majeure:** The Firm shall not be held responsible for failure to perform the duties and responsibilities imposed by the Contract due to legal strikes, fires, riots, rebellions, and acts of God beyond the control of the Firm unless otherwise specified in the Contract.
- 1.26. Independent Firm:** The Firm shall be legally considered an independent firm and neither the Firm nor its employees shall, under any circumstances, be considered servants or agents of the Owner. The Owner shall be at no time legally responsible for any negligence or other wrongdoing by the Firm, its servants, or agents. The Owner shall not withhold from the Contract payments to the Firm any federal or state unemployment taxes, federal or state income taxes, Social Security, or any other amounts for benefits to the Firm. Further, the Owner shall not provide to the Firm any insurance coverage or other benefits, including Workers' Compensation, normally provided by the Owner for its employees.
- 1.27. Ownership:** All Deliverables created by the Firm for the Services shall become the property of the Owner. Except as the same is manifest from the Deliverables and the transfer of the same to the Owner, the Firm shall not be deemed to have transferred, assigned, or divested its trade secrets, know-how, or intellectual property used or applied by the Firm for the creation of the Deliverables.
- 1.28. Patents/Copyrights/Infringements:** The Firm agrees to protect the Owner from any claims involving infringements of patent(s) and/or copyright(s). In no event shall the Owner be liable to the Firm for any claims, damages, awards, and/or costs of defense arising on the grounds of infringement(s) by the Firm. Patent/copyright infringement shall null and void any agreement resulting from the Firm's price proposal.

The Firm warrants that its Service(s) do not and will not infringe any patent(s), copyright(s), or intellectual property right(s). The Owner shall not be liable for any claims, damages, awards, and/or costs due to or arising from such infringement(s). Failure to comply with the representation shall render the Firm's price proposal and resulting Contract null and void, except for the indemnification provisions outlined in Section 1.9 and this paragraph.

- 1.29. Governing Law:** The Contract and/or any agreement arising out of or under the Contract shall be deemed to have been made and shall be construed and interpreted by, the laws of the City of Grand Junction, Mesa County, Colorado. Any action arising out of or under the Contract shall be in District Court, 21st Judicial District, Mesa County, Colorado.
- 1.30. Expenses:** Expenses incurred in the preparation, submission, and presentation of a price proposal in response to this negotiation are the responsibility of the Firm and shall not be charged to the Owner.
- 1.31. Sovereign Immunity:** The Owner specifically reserves and asserts its rights to sovereign immunity under Colorado Law.
- 1.32. Public Funds/Non-Appropriation of Funds:** Funds for payment have been provided through the Owner's budget approved by the City Council for the stated fiscal year only. Colorado Law prohibits the obligation and expenditure of public funds beyond the fiscal

year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise past the end of the stated Owner's fiscal year shall be subject to budget approval. The Contract, if any, will be subject to and must contain a non-appropriation of funds clause/limitation on multi-year fiscal obligation(s) as required by Article X, Section 20. of the Colorado Constitution, and other applicable law(s).

1.33. Performance of the Contract: The Owner reserves the right to enforce the performance of the Contract in any manner prescribed by law or equity as deemed by the Owner to be in the best interest of the Owner (in the event of breach or default) of resulting Contract award.

1.34. Default: The Owner reserves the right to terminate the Contract in the event the Firm fails to meet delivery or completion schedules, or otherwise perform under the Contract. Breach of Contract or default authorizes the Owner to purchase like services elsewhere and charge the full cost to the defaulting Firm.

1.35. Definitions:

1.35.1. "City" or "Owner" is the City of Grand Junction, Colorado, and is referred to throughout the Contract Documents.

1.35.2. "Consultant" or "Firm" is the person, organization, entity, or consultant identified as such in the proposal and throughout the Contract. The term encompasses the Consultant, Firm, or its authorized representative(s).

1.35.3. "Deliverable" refers to any tangible or intangible work product, report, document, presentation, or other output produced by the Consultant as part of the Services contract to facilitate the hiring process for the City Manager position. All deliverables must comply with the Americans with Disabilities Act (ADA) and HB21-1110, which mandates adherence to the provisions outlined in §§24-85-101, C.R.S., and subsequent sections, as well as the Accessibility Standards for Individuals with a Disability established by the Office of Information Technology under section §24-85-103(2.5), C.R.S. Additionally, all documents must align with the State of Colorado's technology standards related to accessibility, including Level A.A. conformity with the latest iteration of the Web Content Accessibility Guidelines (WCAG) as integrated within the State of Colorado's technology standards. This may include, but is not limited to, candidate profiles, screening reports, interview summaries, and any other materials deemed necessary or relevant to the successful completion of the Executive Search Services.

1.35.4. "Service" refers to the endeavor outlined in this negotiation to create the service, deliverables, and outcome.

Section 2.0. Insurance Requirements

2.1. Insurance Requirements: The selected Firm agrees to procure and maintain, at its own cost, policies of insurance sufficient to insure against all liability, claims, demands, and other obligations assumed by the Firm under the Contract. Such insurance shall be in addition to any other insurance requirements imposed by the Contract or by law. The Firm

shall not be relieved of any liability, claims, demands, or other obligations assumed according to the Contract because it failed to procure or maintain insurance in sufficient amounts, durations, or types.

The Firm shall procure and maintain and, if applicable, shall cause any subcontractor of the Firm to procure and maintain insurance coverage listed below. Such coverage shall be procured and maintained with forms and insurers acceptable to the Owner. All coverage shall be continuously maintained to cover all liability, claims, demands, and other obligations assumed by the Firm under the Contract. In the case of any claims-made policy, the necessary retroactive dates and extended reporting periods shall be procured to maintain such continuous coverage. Minimum coverage limits shall be as indicated below unless specified otherwise in the Special Conditions:

- (a) Worker Compensation: The Firm shall comply with all State of Colorado Regulations concerning Workers' Compensation and other statutory insurances as required.
- (b) Comprehensive General Liability Insurance with minimum combined single limits of:

ONE MILLION DOLLARS (\$1,000,000) for each occurrence and
TWO MILLION DOLLARS (\$2,000,000) per job aggregate.

The policy shall apply to all premises, products, and completed operations. The policy shall include coverage for bodily injury, broad form property damage (including completed operations), personal injury (including coverage for contractual and employee acts), blanket contractual, products, and completed operations. The policy shall contain a severability of interest provision.

- (c) Comprehensive Automobile Liability insurance with minimum combined single limits for bodily injury and property damage of not less than:

ONE MILLION DOLLARS (\$1,000,000) for each occurrence and
ONE MILLION DOLLARS (\$1,000,000) aggregate

Concerning each of the Firm's owned, hired, or non-owned vehicles assigned to be used in the performance of the Service(s). The policy shall contain a severability of interest provision.

- (d) Professional Liability & Errors and Omissions Insurance policy with a minimum of:

ONE MILLION DOLLARS (\$1,000,000) per claim

This policy shall provide coverage to protect the Firm against liability incurred as a result of the professional Service(s) performed as a result of responding to this negotiation.

- (e) Intellectual Property Infringement Liability Insurance policy, providing coverage for claims arising from allegations of trademark, copyright, or patent infringement related services, with a minimum of:

ONE MILLION (\$1,000,000) for each occurrence and

ONE MILLION (\$1,000,000) aggregate

- 2.2. Additional Insured Endorsement:** The policies required by paragraphs (b), (c), and (e) above shall be endorsed to include the City of Grand Junction, its elected and appointed Officials, employees, and volunteers as Additional Insureds. Every required policy above shall be primary insurance, and any insurance carried by the Owner, its officers, or its employees, or carried by or provided through any insurance pool of the Owner, shall be excess and not contributory insurance to that provided by the Firm. The Firm shall be solely responsible for any deductible losses under any policy required above



City of Grand Junction

Executive Search Services - City Manager

PROPOSAL / February 29, 2024





February 29, 2024

Mayor Anna Stout
City of Grand Junction
Grand Junction City Hall
250 North 5th Street
Grand Junction, CO 81501

Subject: Proposal for Executive Search Services

Dear Mayor Stout:

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.

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 160 of the country's leading local government consultants. We know that our combined capabilities and resources will provide added value to our clients.

Our project team for the City of Grand Junction (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 Grand Junction. If you have any questions, please contact Catherine Tuck Parrish, our executive services 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



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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.

FIRM OVERVIEW

Who We Are

RAFTELIS AND THE NOVAK CONSULTING GROUP, HELPING 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 600 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 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 160 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 Grand Junction and help to make this project a success.

RESOURCES & 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 160 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 Grand Junction 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



FINANCE: Meet your goals while maintaining a financially sustainable organization

- 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



COMMUNICATION: Communicate strategically to build an informed, supportive community

- 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



STRATEGIC PLANNING: Set the direction for the future of your organization and community

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



ORGANIZATION: Plan for long-term sustainability and operate with maximum efficiency

- Organizational and operational assessments
- Stormwater utility development and implementation support
- Performance measurement
- Staffing analysis
- Organizational climate and culture
- Asset management and operations
- Regional collaboration and service sharing
- Process improvement



TECHNOLOGY: Use your data and technology to improve experience and gain valuable insights

- Billing, permitting, and customer information audits
- Business process development
- Data management, analytics, and visualization
- Performance measurement and dashboarding
- Software solutions
- Website development
- Information technology assessments and strategic planning
- Customer management assessments and optimization
- CIS selection and implementation
- AMR/AMI feasibility studies
- Mobile workforce management
- Meter data management
- CMMS selection and implementation
- GIS optimization services
- Fleet management systems



EXECUTIVE RECRUITMENT: Identify top talent to lead local governments and utilities

- Executive recruitment services
- Executive coaching services
- Facilitated executive evaluations

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), 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 **women**

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 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 CITY MANAGER 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 first meet virtually (by phone or video conference) with members of the City Council individually and as a group to discuss the recruitment timeline and process. We will also facilitate four meetings to gather input from the outgoing City Manager (if available), department directors, and other key stakeholders. 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 Colorado, the western US, and the nation. We will prepare a position profile that is unique to the City of Grand Junction. 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 hiring manager. Modifications will be made as necessary before recruitment begins.

DELIVERABLES:

- Detailed recruitment process documents, including recruitment plan, position profile, recruitment brochure, 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 from 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 encouraging 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 International City/County Management Association (ICMA), and several leadership academies for women in local government in different states.

We will place job postings with ICMA, Colorado Municipal League, and other targeted state associations in the west identified in the recruitment plan. We also recommend national organizations such as ELGL, National Forum for Black Public Administrators, and 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 Grand Junction.

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, people of color, and individuals from other underrepresented groups 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 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 City's direction, we will finalize a list of 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 with the City Council.

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 that conform to Colorado state law.

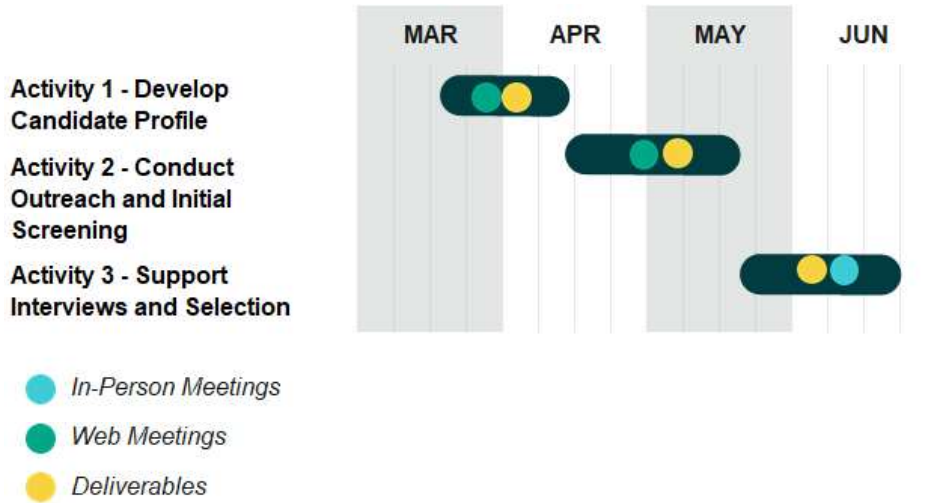
We also can assist in negotiating the employment offer. We will provide information about best practices in salary and total compensation, and we will have obtained information on the candidate’s salary preferences. We will keep candidates apprised of their status and release them at the appropriate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

DELIVERABLES

- Interview book materials including references and background checks

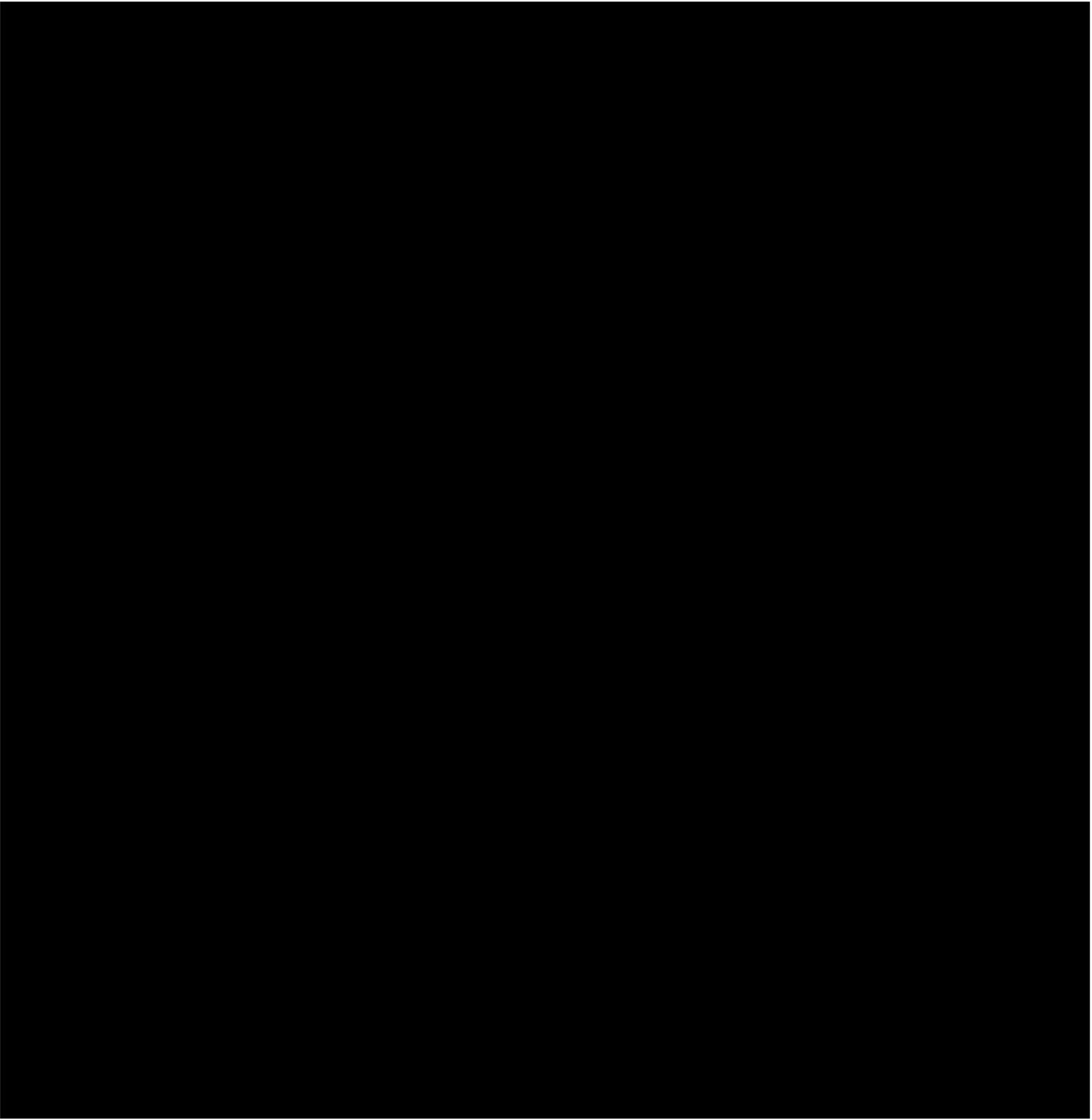
Recruitment Timeline

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.



EXPERIENCE

References



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 – Executive Search



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 manager/ administrator; police chief; fire chief; directors of public works, planning, economic development, finance, human resources, and human services; and many 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 the City of 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 also served as an ethics advisor at the International City/County Management Association (ICMA), counseling elected officials and citizen groups regarding employment agreements, form of government issues, and recruitment. Additionally, she 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

LEAD 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 seven years in full lifecycle recruiting, sourcing, interviewing, and professional coaching. As a recruiter Robert has engaged in searches within both the public and social sector. 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 change ranging from individual executive employees transitions to large reductions in force. Work with these clients often included one-on-one coaching over the course of multiple months. Robert additionally hosted and development multiple large group workshops for companies. He further 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

- Raffelis: Senior Consultant (2021-present)
- 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)

Professional Memberships

- SHRM/PHRMA

Kelsey Batt

RECRUITMENT SPECIALIST

Consultant

PROFILE

Before joining Raftelis as a recruitment specialist in 2021, Kelsey earned her bachelor's degree in Professional Writing and Creative Writing from Purdue University in West Lafayette, Indiana.

During her time as a student, Kelsey worked at the Purdue Writing Lab as an undergraduate tutor where she paired 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 Track and Cross-Country teams while at Purdue.

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 was responsible for producing and editing social media and blog content. Kelsey enjoys consuming and contributing to the world of journalism, having worked as a student journalist at the Purdue Exponent for several years.



Specialties

- Executive search
- Recruiting
- Editing

Professional History

- Raftelis: Associate Consultant (2021-present)
- 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 in 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: Associate Consultant (2022-present)
- 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 City Manager recruitment, as outlined in this proposal, is \$35,500. This includes all professional fees and expenses for Raftelis.

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

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 – \$10,465	After delivery of the recruitment documents <ul style="list-style-type: none"> • Recruitment plan • Recruitment brochure • First-year goals
Activity 2 – \$13,169	After the candidate review
Activity 3 – \$11,866	After the interviews are completed

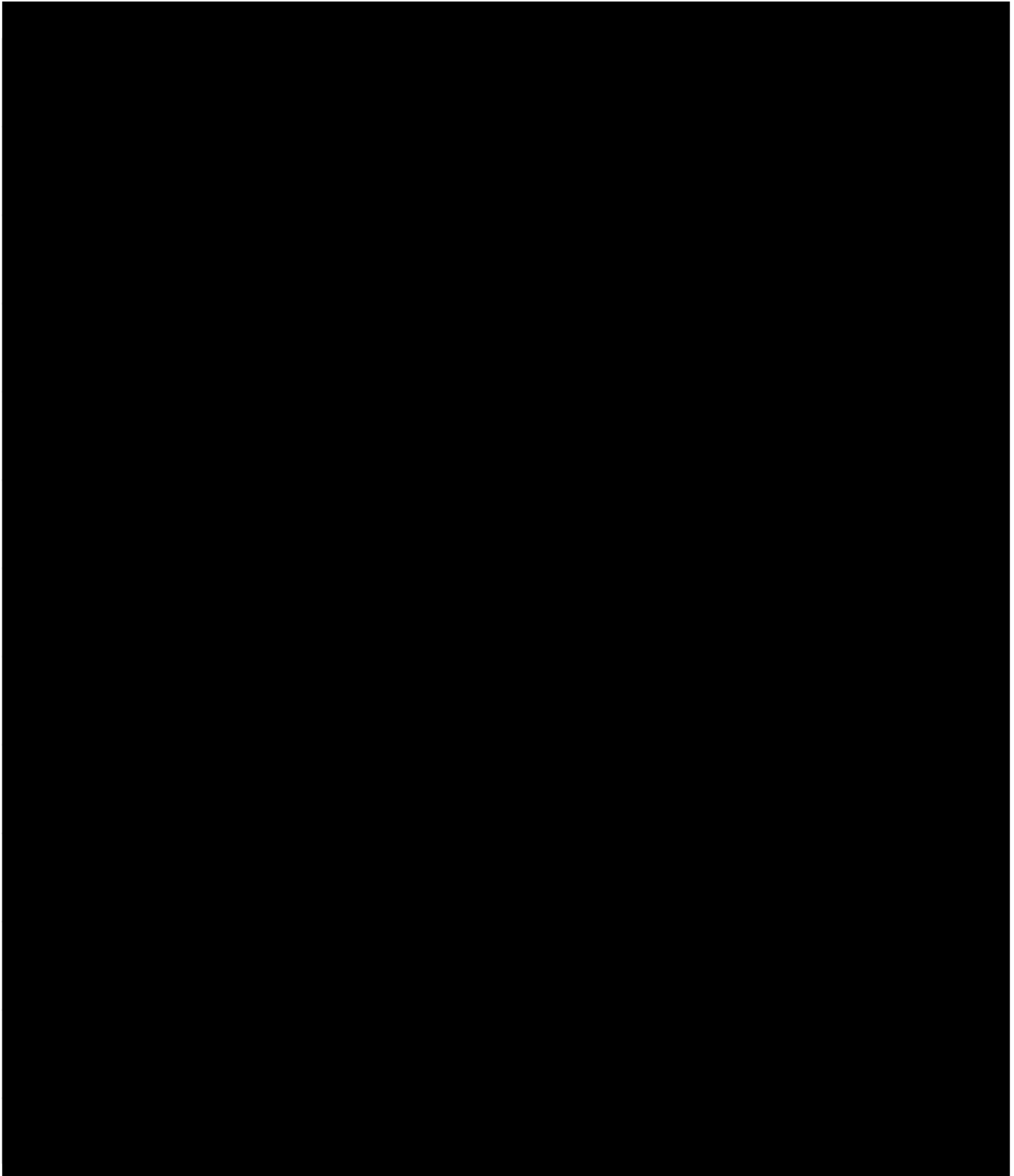
Within six (6) months of the final interview process, should an additional candidate be hired by the City from the pool of candidates presented by Raftelis for this project, the additional fee shall be \$15,000.

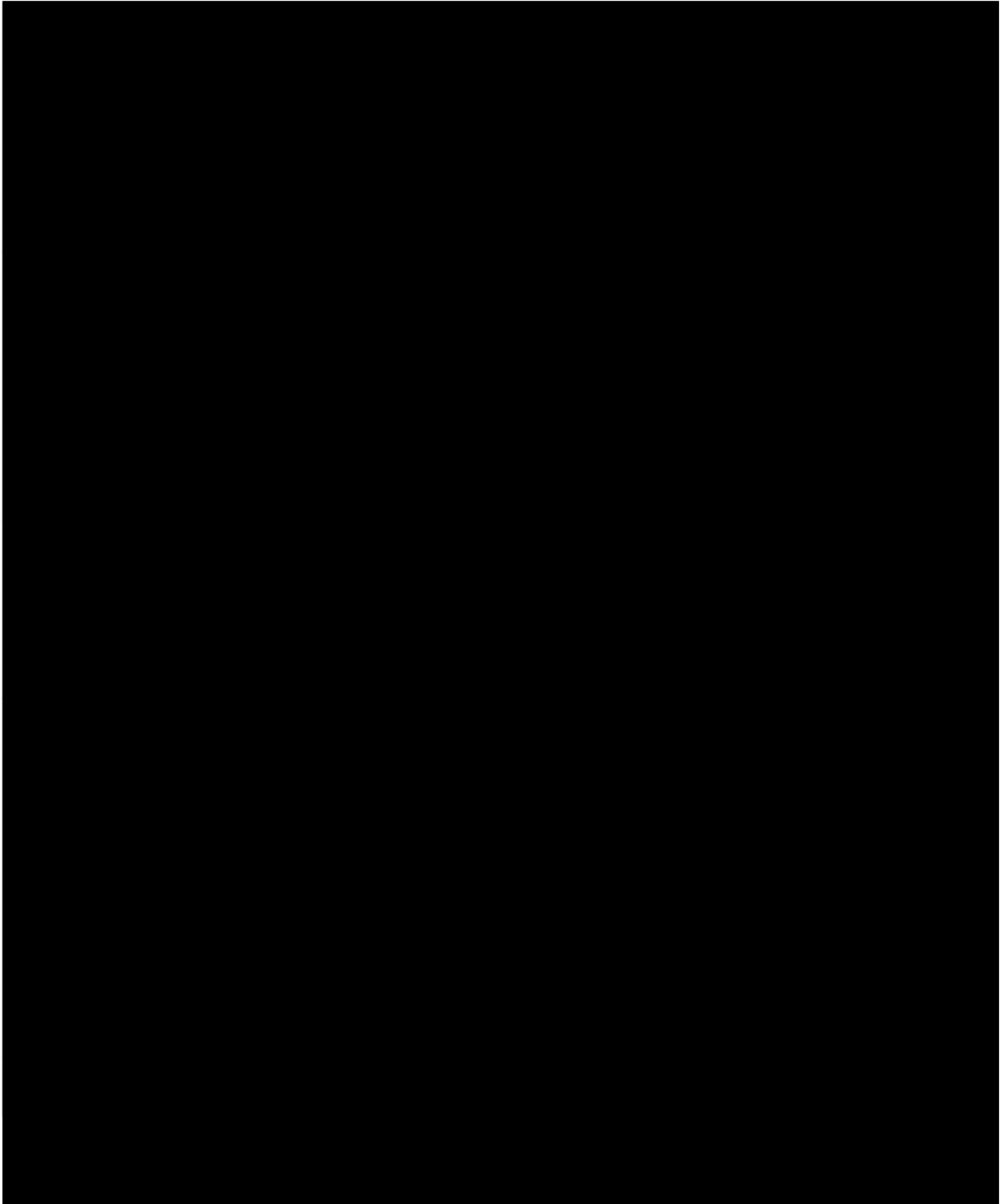
APPENDIX: ADDITIONAL RELEVANT EXPERIENCE

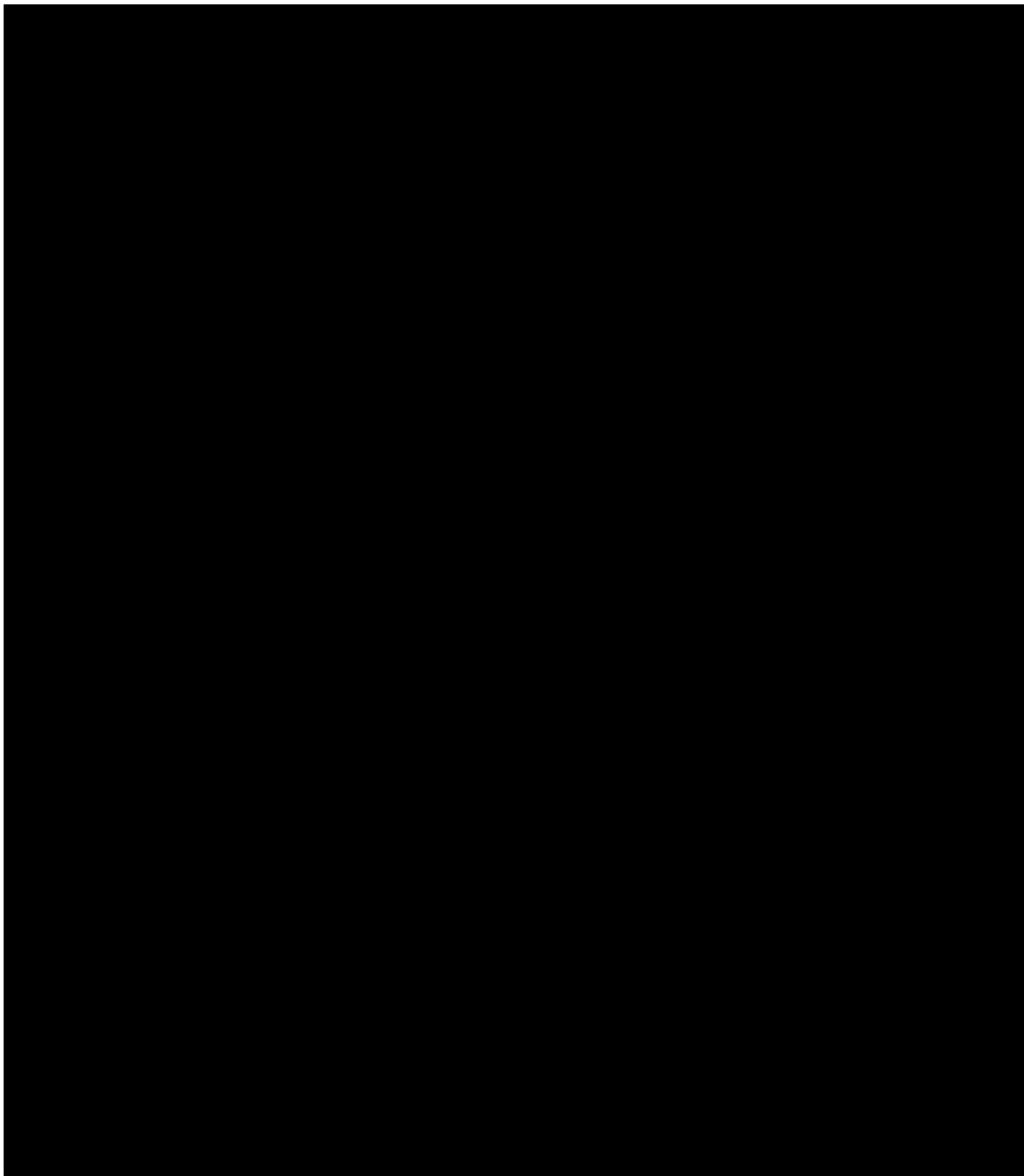
Appendix: Additional Relevant Experience

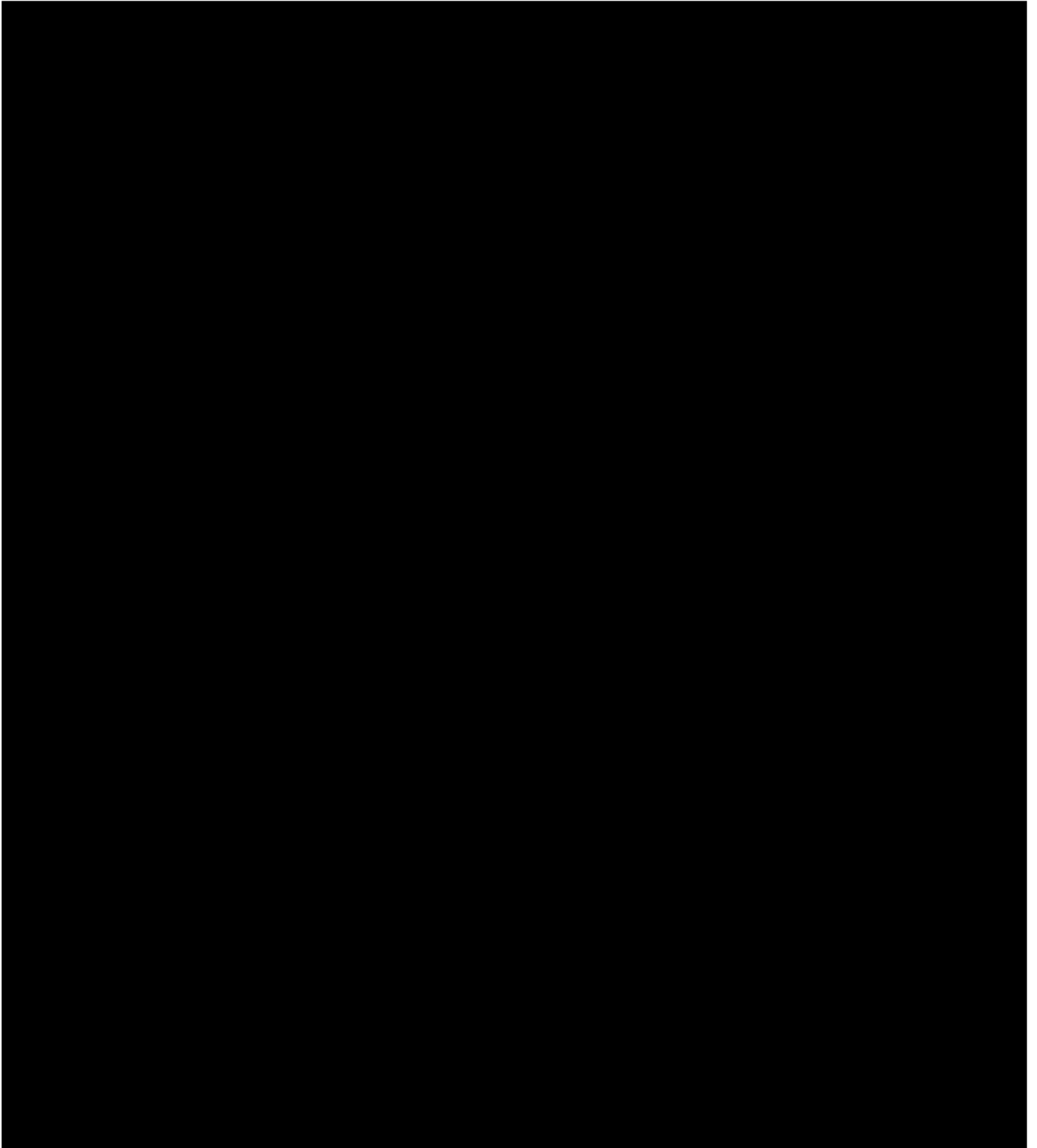


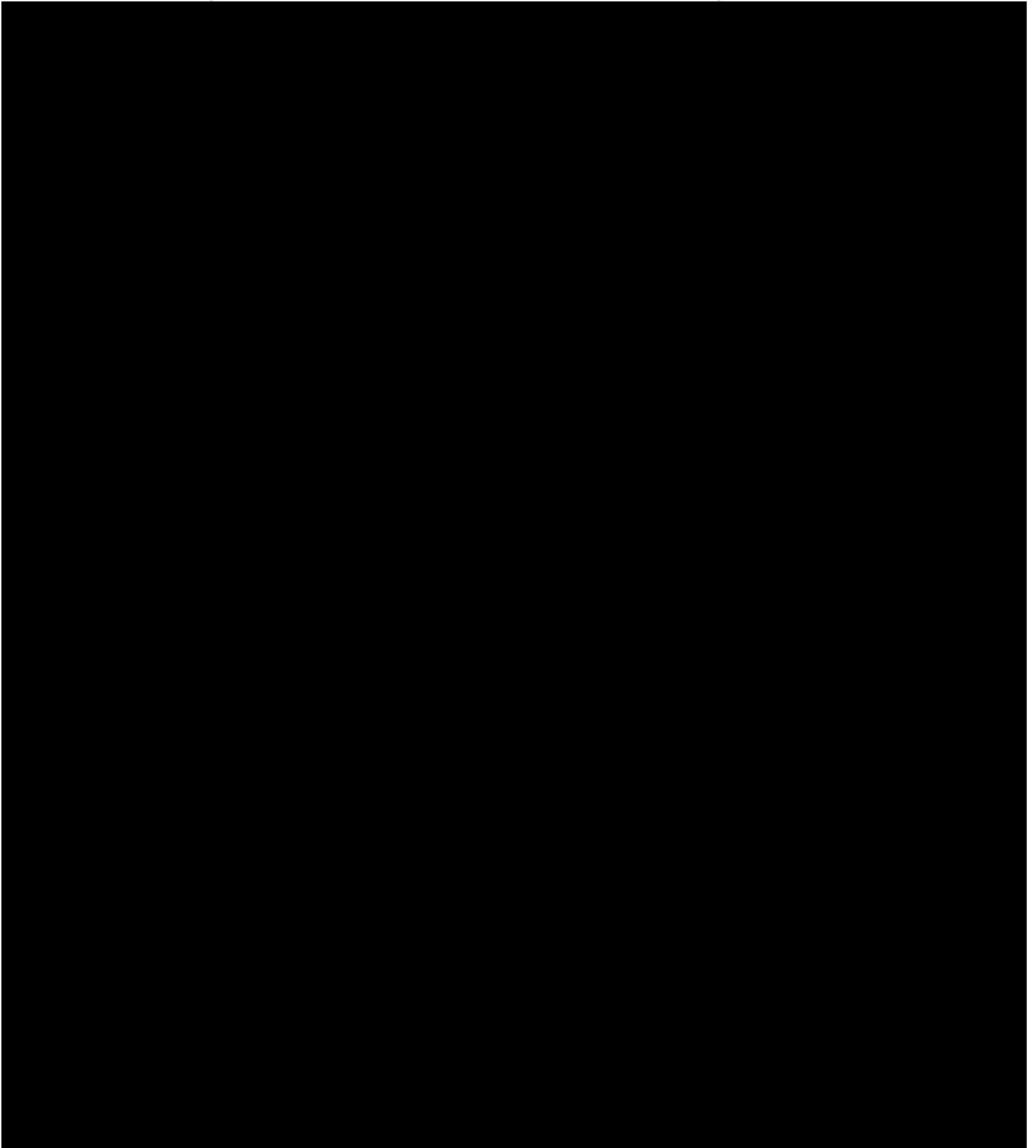
Recent Executive Search Experience











DESCRIPTIONS (Continued from Page 1)

written contract. The coverage afforded to the Additional Insured is on a Primary and Non-Contributory basis for General Liability, Automobile and Umbrella if required by written contract. Waiver of Subrogation applies to General Liability, Automobile, Workers Compensation and Umbrella policies in favor of the above listed Additional Insured per written contract. A 30 day notice of cancellation will be given except for non-payment of premium will be 10 days if required by written contract. Intellectual Property Infringement

Liability Insurance policy, providing coverage for claims arising from allegations of trademark, copyright, or patent infringement related services, is included under the GL policy.