



Submission date: January 18, 2019

Recruitment Proposal for General Manager

San Mateo County Harbor District

Submitted by:

Koff & Associates

GEORG S. KRAMMER
Chief Executive Officer

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January 18, 2019

Ms. Sabrina Brennan
Commission President
San Mateo County Harbor District
504 Avenue Alhambra, Suite 200
P.O. Box 1449
El Granada, CA 94018

Dear Ms. Brennan:

Thank you for the opportunity to respond to your request to provide you with a detailed scope of work for Executive Recruitment for the position of **General Manager**, for the **San Mateo County Harbor District** ("District"). We are most interested in assisting the District with this critical effort for this position. We are committed to providing exceptional service and excellent results.

Koff & Associates ("K&A") is an experienced Human Resources consulting firm that has been assisting special districts, counties, cities, courts, and other public agencies with their executive and staff level recruitment needs and other human resources needs for thirty-five (35) years. K&A has achieved a reputation for working successfully with County Commissions, City Councils, Boards of Directors, management, employees, and union representatives. We feel that our firm is exceptionally qualified to support you with your executive search efforts because of our extensive experience with the transportation sector throughout the State of California. We have successfully placed numerous executives and managers during the last three decades and are confident we can accomplish a successful placement for the District.

In addition to using innovative candidate sourcing strategies we will tap into our internal network of contacts. We have cultivated this network over the course of 35 years, not only performing executive search efforts but by providing a wide variety of other services to public agencies, including organizational development efforts and org assessments, agency-wide classification and compensation studies, and other HR-related services. We have made a real tangible difference for hundreds of public agencies throughout California and the western region and have forged strong strategic relationships with countless agency leaders.

As a consulting firm, K&A has an advantage. Not only does our recruitment division have extensive public-sector experience, it takes a consultative approach. K&A's unique selling proposition lies in its ability to support clients through the deep understanding K&A has of characteristics of public entities and the operations, positions, and people within them. The combination of value-added services we offer saves decision makers time and gives them the detail they want by providing analysis they would otherwise not do themselves and gives them transparency into K&A's approach.

As Chief Executive Officer of the firm, I would be Co-Project Director for the recruitment effort together with our Senior Recruiters, Fran Trant and Richard O'Donnell. You can reach me at (510) 658-5633 and my email address is gkrammer@koffassociates.com. Fran's email is frant@koffassociates.com, and Richard's email is rodonnell@koffassociates.com, and they each can be reached at the same telephone number here in Berkeley.

Our fax number is (510) 652-5633. We will also be assisted in our efforts by Sarah Nunes, former Director of the Employment Division for the City of San José, and who is now a consultant for Koff & Associates.

Please call or email if we can provide any additional information.

We look forward to the opportunity to provide professional recruitment services to the **San Mateo County Harbor District**.

Sincerely,



Georg S. Krammer
Chief Executive Officer



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FIRM QUALIFICATIONS

Koff & Associates (“K&A”) is a full spectrum, public-sector human resources consulting firm that was founded in 1984 by Gail Koff, and has been assisting special districts, cities, counties, other public agencies, and non-profit organizations with their Human Resources needs for thirty-five (35) years.

We are a **private California corporation, #2785458**, and our **legal name is Kaneko & Krammer Corp. dba Koff & Associates, Inc.** Our headquarters are in Berkeley, CA, and we have satellite offices in Southern California, the Central Valley, and the Sacramento Region. We are a California State-certified Small Business Enterprise (#58366); and through the County of Alameda, we are also a locally certified Local, Small Local, and Very Small Local Business Enterprise.

We are familiar with the various public sector organizational structures, agency missions, operational and budgetary requirements, and staffing expectations. We have 35 years of experience working in both union and non-union environments (including service as the management representative in meet-and-confer and negotiation meetings), working with Boards of Commissioners, Boards of Directors, Boards of Supervisors, Boards of Trustees, Merit Boards, City Councils, County Commissions, Advisory Committees, Agency and District leadership team members, and Joint Power Authorities.

K&A’s areas of focus are executive search and staff recruitments; classification and compensation studies; organizational development/assessment studies; performance management and incentive compensation programs; development of strategic management tools; policy/procedure development and employee handbooks; training and development; public agency consolidations and separations; Human Resources audits; and serving as off-site Human Resources Director for our smaller public agencies that need the expertise of a Human Resources Director but do not need a full-time, on-site professional.

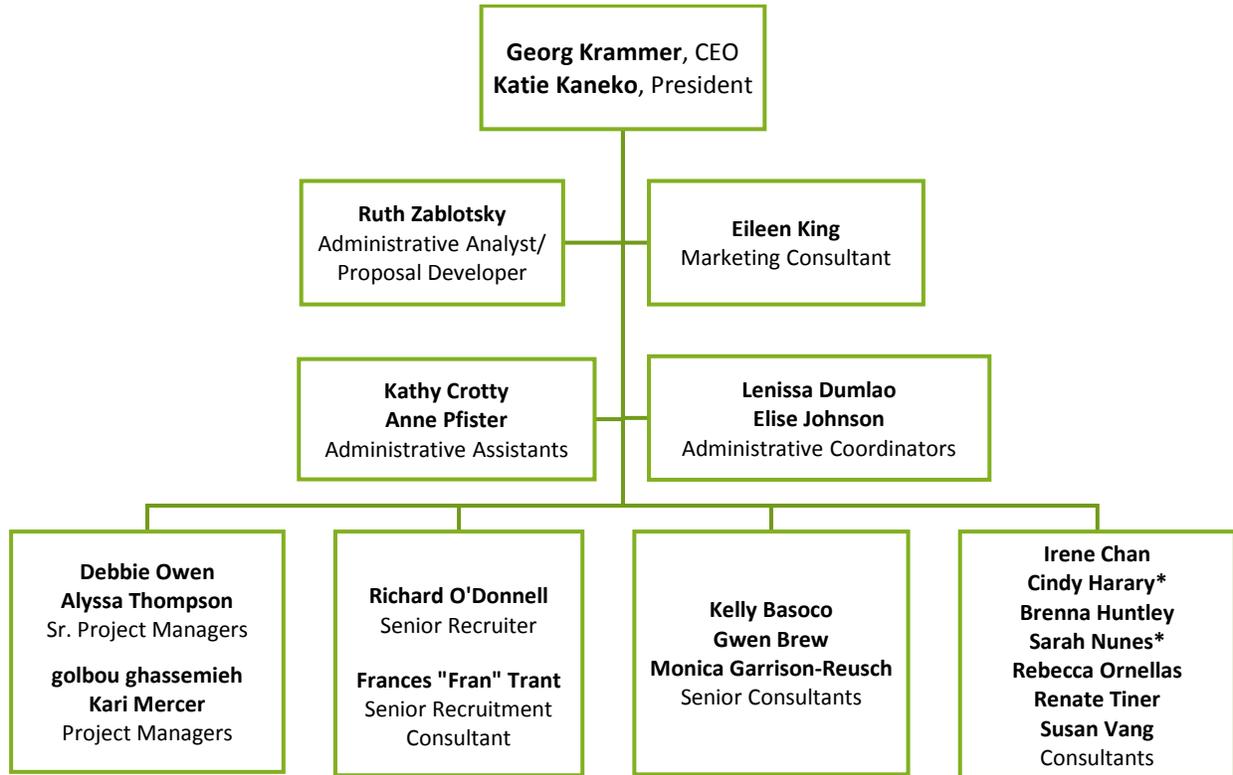
Without exception, all of our executive recruitments have successfully met all of our intended commitments; communications were successful with client agencies and job candidates; and we were able to assist each agency in successfully placing highly qualified candidates. All recruitments were brought to completion within stipulated time limits and proposed fees. Many of our clients use our recruitment services year in, year out because of their satisfaction with our success in providing placements for the positions they seek to fill.

Our long list of clients is indicative of our firm’s reputation as being a quality organization that can be relied on for producing comprehensive, sound, and cost-effective results. K&A has a reputation for being “hands on” and responsive with the ability and expertise to identify the ideal candidate to add value to your organization.

K&A relies on our stellar reputation and the recommendations and referrals of past clients to attract new clients. Our work speaks for itself and our primary goal is to provide professional and technical consulting assistance with integrity, honesty and a commitment to excellence. We are very proud of the fact that we have not had any formal appeals in our history, working with hundreds of public agency clients and completing hundreds of recruitments and studies.



Our entire team consists of twenty-four (24) employees as shown below in our organizational chart.



**Cindy and Sarah also work as Recruitment Consultants with Georg, Richard, and Frances.*

No subcontractors will be assigned to this study.

TEAM MEMBER QUALIFICATIONS

Following are short biographies of the specific staff who will be assigned to this recruitment (full résumés for each will be found in the Appendix):

**Georg Krammer, M.B.A., S.P.H.R.
Chief Executive Officer**

Georg brings over twenty (20) years of management-level human resources experience to Koff & Associates with an emphasis in organizational development; classification and compensation design; market salary studies; executive and staff recruitment; performance management; and employee relations, in the public sector, large corporations and small, minority-owned businesses. He had five (5) years in the private sector where he served as an HR Manager, as an Administrative Officer, and then as an HR Director.

After obtaining a Master of Arts in English and Russian and teaching credentials at the University of Vienna, Austria, Georg came to the United States to further his education and experience and attained his Master of Business Administration from the University of San Francisco. After starting his HR career in



Wells Fargo's college recruiting department, he moved on to HR management positions in the banking and high-tech consulting industries. With his wide-ranging and deep experience as a well-rounded senior HR generalist, his education in business and teaching, his depth and breadth of experience with public sector HR needs, programs, and functions, Georg's contribution to K&A's variety of projects greatly complements the Koff & Associates consulting team. He has spearheaded several hundred classification, compensation, organizational, strategic planning, etc., studies for hundreds of cities, towns, counties, and special districts throughout the State of California and has contributed to more than quadrupling the size of Koff & Associates as a result of the success of his projects and the subsequent expansion of the business through referrals from satisfied clients. Georg joined K&A in 2003 and has been the firm's Chief Executive Officer since 2005.

Georg has extensive transportation experience and has worked with countless transportation authorities, ports, transit authorities, metropolitan planning organizations, congestion management agencies, airports, and other agencies in the transportation field, including all agencies listed in the reference section of this proposal.

In addition to the studies above, Georg also has over fifteen (15) years of recruiting experience in the public sector, including but not limited to, agencies such as the following:

- **Cities:** Berkeley, Fairfield, Hayward, Delano, Oxnard, Pinole, Richmond, Sacramento, San Mateo, San José, San Pablo, Tracy, and the Town of Atherton.
- **County:** Solano.
- **Special Districts:** **Alameda County Transportation Commission**, Alameda County Water District, Alameda Housing Authority, Bay Area Clean Water Agencies, Castro Valley Sanitary District, Central Marin Sanitation Agency, Central Contra Costa Sanitary District, Coastside County Water District, Delta Diablo Sanitation District, Dublin San Ramon Services District, FIRST 5 Alameda, **Fresno County Transportation Authority**, Joshua Basin Water District, Mid-Peninsula Water District, Mt. View Sanitary District, Ojai Valley Sanitary District, **Port of Oakland**, **Santa Clara Valley Transportation Authority**, South Coast Water District, Superior Court of California-Los Angeles, Superior Court of California-Orange County, **Shasta Regional Transportation Agency**, Union Sanitary District, United Water Conservation District, Vallejo Flood and Wastewater District, Valley County Water District, Yorba Linda Water District, etc.

Georg will be key personnel and serve as the Project Director for this important recruitment for the District; he will coordinate all of K&A's efforts and will be responsible for all work products and deliverables.

Richard O'Donnell, B.S.
Senior Recruiter

Richard has nine (9) years of experience recruiting in a wide variety of sectors and disciplines, including technical, engineering, human resources, labor and employee relations, water/wastewater, landscape architecture, building regulation, urban planning, and financial. His experience encompasses entities of all sizes, from smaller special districts to the largest cities in California.



Since joining K&A, Richard has either successfully completed the following executive searches, or is currently in the process of completing a recruitment for the agency shown:

- **Cities:**
 - Arcata: Building Official
 - Modesto: Community Development Manager
 - Sacramento: Director of Finance; Diversity Manager; Director of Human Resources
 - San Diego: Public Utilities Director
 - San José: Director of Human Resources; Deputy Director of Police [Gaming Division]; Senior Landscape Architect; Planning, Building and Code Enforcement Director

- **Special Districts:**
 - Alameda County Water District: Project Engineering Manager
 - Central Marin Sanitation Agency: Technical Services Manager; Laboratory Analyst; Electrical and Instrumentation Technician; Environmental Services Analyst
 - Coastside County Water District: Superintendent of Operations
 - Dublin San Ramon Services District: Water Operations Maintenance Supervisor
 - Mt. View Sanitary District: Maintenance Scheduler/Planner; Wastewater Operations Supervisor; District Engineer
 - Oakland Housing Authority: Information Technology Director
 - Paradise Irrigation District: District Manager
 - **Port of Oakland**: Human Resources Manager; Director of Information Technology
 - Ross Valley Sanitary District: General Manager
 - Housing Authority of the City of San Buenaventura: Chief Financial Officer; General Counsel
 - Santa Clara Valley Transportation Authority: Manager of Procurement
 - Vallejo Flood & Wastewater District: Human Resources Director; Director of Administration

Richard graduated with a double major from the University of California Santa Cruz, earning a B.S. degree in both economics and accounting.

As Co-Project Director with Georg Krammer, Richard will lead the recruitment effort for the District. He will coordinate all of K&A's efforts, will attend all meetings with the District and will be responsible for all work products and deliverables.

**Frances "Fran" Trant, SPHR, SHRM-SCP
Senior Recruiter/ Senior Consultant**

Frances has over thirty (30) years of Human Resources experience with fifteen (15) years in a variety of California public sector health care, education (school district and University of California systems), and special district organizations, as well as another fifteen (15) years in both private-sector and public-sector organizations throughout North America. Seventeen (17) of those years were in leadership positions where she was a member of leadership teams and responsible for the delivery of complete HR services



including Recruitment, Compensation and Benefit program management, Labor/Employee Relations, and leading nation-wide affirmative action programs. Company sizes have ranged from 100 to 17,000.

Additionally, she provides important partnership in our executive recruitment process. Working closely with both Georg and Richard, based on her vast experience with public sector recruitment at all levels, from entry-level professionals to senior and executive managers, Fran will provide her senior recruitment expertise for this executive search, including résumé and application review, interview content development, and facilitation of screening interviews.

Fran has taught the Human Resources Certification Institute (HRCI) certification exam preparation course for the past fifteen (15) years throughout the San Francisco Bay region, ensuring a wide variety of HR professionals receive their national HR certification and are able to practice as credible professionals in their workplaces.

She joined Koff & Associates in April, 2018. We're thrilled to have someone with her background on our senior team. A few of the varied projects Fran has worked on since joining K&A include:

- **Recruitment:** currently completing executive recruitments for Mt. View Sanitation District (Administrative Services Manager); and the Housing Authority of the City of San Buenaventura (Chief Financial Officer).
- **Cities/Towns:** Atherton, Colfax, Discovery Bay, Los Altos, Marysville, Redlands (Water and Wastewater Department), Vallejo.
- **Special Districts (providing On-Call H.R. Services):** Alameda County Transportation Commission ("ACTC"), Buena Park Library District, Metropolitan Water District, Truckee Sanitation District.
- **Conference Speaker:** Designed and delivered workshop on leadership competency expectations for CalGov HR Emerging Leaders 2018 conference.
- **Classification and Compensation Studies:** ACTC, Albany (Police Department non-sworn staff), East Contra Costa Fire District, East Palo Alto Sanitary District, Housing Authority of the County of San Bernardino, Solano County Detention Services Sworn Officers.

Fran received her university education in Canada and passed her American HR certifications at the senior level (SPHR & SHRM-SCP), to provide high quality HR expertise when she moved to the U.S.

Together with Georg and Richard, Fran will play a major role in the recruitment effort for the District and the General Manager position.

Sarah Nunes, M.A.
Recruitment Consultant

Sarah's professional qualifications include over nineteen (19) years of public sector experience with the Human Resources Department of the City of San José. Starting at the analyst level and eventually rising to the position of Employment Division Manager, she gained experience in recruitment and selection, classification and compensation, and general human resources administration.



Since joining Koff & Associates in 2017, Sarah has worked on Classification and Compensation studies for the following agencies: City of Calistoga, Town of Los Gatos, **County of San Mateo, Metropolitan Transportation Commission, SF Bay Area Water Emergency Transportation Authority**, Housing Authority of the County of Alameda, Santa Clara Valley Open Space Authority, and Napa Sanitation District.

Additionally, she provides important partnership in our executive recruitment process. Working closely with both Georg and Richard, Sarah will provide recruitment consultation support for this executive search, including résumé and application review and interview content development, based on her wide experience with public sector recruitment at all levels, from entry-level professionals to senior and executive managers, for the City of San José. Some of the San Jose department-level director recruitments on which she worked were: Director of Environmental Services; Aviation Director; Assistant Director of Planning, Building and Code Enforcement; and **Director of Transportation**.

Sarah earned her B.A. degree in Anthropology from Beloit College, in Wisconsin, and was awarded her M.A. in Anthropology from California State University, in Chico.

Anne Brooks Pfister
Administrative Assistant

Anne’s comprehensive administrative background as an executive assistant and liaison to a board of trustees at a major Bay Area scientific institute, serves to make her versatile in supporting K&A’s projects, consultants, clients, and executive team. Her can-do spirit and resourceful organizational skills enabled her to successfully orchestrate 100+ public educational/outreach events (with such notables as Steve Martin and Alan Alda, among others) and fundraising events in the Bay Area for the nonprofit scientific organization. In addition, Anne coordinated the recruitments for the Director and Deputy Director positions during her thirteen (13) years with her former employer.

She also has analytical and marketing skills gained from a biotechnology background working both “at the bench” in a lab at Fortune 500 Chiron Corporation (now Novartis) and in corporate communications for a biotech start-up.

Anne has a B.S. in art history from Willamette University and a post-baccalaureate degree from Mills College in biochemistry and molecular biology.

Anne has been with K&A for a year and a half and works closely with the Recruitment Team to provide the administrative support needed in terms of scheduling interviews, printing materials needed for clients, background verifications, etc.



REFERENCES

Recruitment & Agency	Contact
<p>Alameda County Transportation Commission</p> <p>2016: Assistant Transportation Planner 2016: Assistant Transportation Engineer 2016: Associate Administrative Analyst 2016: Principal Transportation Planner 2016: Project Controls Engineer 2016: Assistant Program Analyst 2016: Senior Program Analyst 2015: Senior Transportation Planner 2015: Assistant Transportation Planner 2015: Senior Transportation Engineer 2015: Contract Procurement Analyst 2014: Accountant 2014: Senior Accountant 2014: Accounting Technician</p>	<p>Mr. Seung Cho Contracting, Admin. & Fiscal Resources Mgr. (510) 208-7472 (direct) 1111 Broadway, Suite 800 Oakland, CA 94607 scho@alamedactc.org</p> <p>Also, Ms. Patricia Reavey Finance Director (510) 208-7400 (main line) preavey@alamedactc.org and, Mr. Arthur Dao Executive Director adao@alamedactc.org</p>
<p>Bay Area Clean Water Agencies</p> <p>2012: Executive Director</p>	<p>Mr. David Williams Executive Director (925) 765-9616 P.O. Box 24055, MS 59 Oakland, CA 94623 dwilliams@bacwa.org</p>
<p>Central Contra Costa Sanitary District</p> <p>2014: Deputy General Mgr. 2014: Director of Operations 2013: General Manager 2013: Director of Administrative Services</p>	<p>Ms. Teji O'Malley Human Resources Manager (925) 229-7309 5019 Imhoff Place Martinez, CA 94553 tomalley@centralsan.org</p>
<p>Contra Costa Transportation Authority</p> <p>2013: Finance Manager</p>	<p>Mr. Randall Carlton Chief Financial Officer (925) 256-4725? 2999 Oak Road, Suite 100 Walnut Creek, CA 94597 rcarlton@CCTA.net</p>
<p>Fresno County Transportation Authority</p> <p>2017: Executive Director</p>	<p>Ms. Rose Willems Measure "C" Advocate (559) 681-9369 2220 Tulare Street, Suite 411 Fresno, CA 93721 rosewillems@comcast.net</p>



Greater Vallejo Recreation District 2017: General Manager	Mr. Gabriel Lanusse General Manager (707) 648-4603 395 Amador Street Vallejo, CA 94590 glanusse@gvrd.org
Housing Authority of the City of San Buenaventura 2019: Chief Financial Officer (underway) 2019: General Counsel (underway)	Ms. Cheryl Tabbi Human Resources Manager (805) 626-5816 995 Riverside Street Ventura, CA 93001 ctabbi@hacityventura.org
Paradise Irrigation District 2018: General Manager	Ms. Georgeanna Borrayo District Secretary (530) 876-2039 6332 Clark Road Paradise, CA 95969 gborrayo@paradiseirrigation.com
Port of Oakland 2018: Human Resources Manager 2016: Director of Information Technology 2015: Aviation Facilities Manager	Mr. Michael Mitchell Director of Human Resources (510) 627-1202 530 Water St. Oakland, CA 94607 mmitchell@portoakland.com
Sacramento, City of 2018: Director of Finance 2018: Diversity and Equity Manager 2018: Director of Human Resources	Ms. Sally Ly Interim Human Resource Manager (916) 808-8907 915 "I" Street Sacramento, CA 95814 Sly@cityofsacramento.org
Santa Clara Valley Transportation Authority 2018: Manager of Procurement, Contracts & Materials 2014: Deputy Director of Transit Operations	Ms. Belle Pannu Sr. Human Resources Analyst Recruitment & Selection Unit, HR Dept. (408) 546-7952 3331 N. First St., B-1 San Jose, CA 95134-1927 belle.pannu@vta.org
South Coast Water District 2017: Chief Financial Officer 2016: Human Resources Manager 2013: General Manager	Mr. Andy Brunhart General Manager (949) 499-4555 34152 Del Obispo St. Dana Point, CA 92629 abrunhart@scwd.org



Superior Court of California, County of Orange 2017: Chief Human Resources Officer 2016: Court Executive Officer 2014: Chief Finance and Administration Officer 2014: Staffing, Class & Comp Officer (Sr. Principal HR Analyst)	Mr. David Yamasaki Court Executive Officer (657) 622-7007 770 Civic Center Dr. West Santa Ana, CA 92701 dyamaski@occourts.org
Superior Court of Los Angeles 2016: Chief Deputy, Finance & Administrative Services	Mr. Michael Lampert Director, HR Administration (213) 633-0405 111 N. Hill St., Suite 203 Los Angeles, CA 90012 mlampert@lacourt.org
Valley County Water District 2016: General Manager	Ms. Jandy Macias Finance and Customer Service Manager (626) 338-7301, X207 14521 Ramona Blvd. Baldwin Park, CA 91706 jmacias@vcwd.org
Yorba Linda Water District 2014: General Manager	Mr. Robert Kiley Board of Directors (714) 701-3000 1717 E. Miraloma Avenue Placentia, CA 92870 rkiley@ylwd.com



WORK PLAN, TECHNICAL APPROACH, and DELIVERABLES

Following are our detailed work plan, technical approach, and deliverables to be completed for this executive-level recruitment for the **San Mateo County Harbor District**:

Phase 1: Kick-off, Advertising and Sourcing

Deliverable 1. Ideal Candidate Profile Developed by Meeting with Key Decision Makers

The identification of the desired profile of the ideal job candidate for an executive level position is crucial for a successful search process. We will meet with the Ad-Hoc Search Committee and the Board of Harbor Commissioners to discuss and refine the District’s needs and resulting position requirements for the **General Manager** position. We recommend also consulting with other leaders associated with the District, to gain an understanding of what they are looking for in the General Manager position, and to develop an ideal candidate profile.

The goal of this phase of the recruitment is to identify and/or develop:

- ❖ The various organizational needs, vision, mission, goals, strengths, challenges, opportunities, dynamics, culture, and staff of the District;
- ❖ Position competency requirements, i.e., knowledge, skills, and abilities;
- ❖ Ideal candidate’s skills, experiences, and characteristic profile;
- ❖ Personal and professional attributes required of and priorities for the new General Manager;
- ❖ Conditions and challenges in achieving the priorities identified above;
- ❖ Scope of community input and participation in the process;
- ❖ Type of working relationship District leadership desires with the new General Manager;
- ❖ Concerns and issues regarding the recruitment and the General Manager position;
- ❖ Advertising strategies in conjunction with a national outreach in both the public sector as well as the private sector;
- ❖ Geographic strategies;
- ❖ Compensation levels; and
- ❖ Completion timetable.

Working closely with key stakeholders, K&A assists in identifying the specific needs of the District and the key competencies and characteristics of the “ideal candidate.” We will obtain an understanding of the District’s and its constituents’ goals and priorities.

Deliverable 2. Position Specification and Action Plan

Once the “ideal candidate” criteria have been established, we will prepare a written job specification that outlines the required skills, competencies, position responsibilities, and criteria for job success. We will provide the written specification to the Ad-Hoc Search Committee and the Commission for review and approval.

In addition, salary and benefit considerations are discussed to ensure market competitiveness, experience and education requirements are considered, geographic recruitment boundaries are identified, and a recruitment action plan will be developed.



At the conclusion of the meeting(s) with the various stakeholder groups, there should be a clear consensus of the key qualifications and characteristics of the position and the process, action plan, and timetable to be utilized for the recruitment activity.

Deliverable 3. Recruitment and Advertisement Strategy that has been Fully Researched, Developed and Implemented

Following the development of the candidate profile, and working closely with our professional design team, a professionally produced recruitment brochure will be prepared and presented to the Ad-Hoc Search Committee for review prior to printing. The brochure will highlight the strengths and challenges of the Ad-Hoc Search Committee, its organizational structure and services, its mission and goals, pertinent facts regarding the position, and necessary and desirable candidate qualifications.

We will use our own resources and coordinate with the District to identify relevant national, state, and local government and industry sources where prospective candidates are likely to be found. Advertisements will be prepared and placed for publication in appropriate newsletters, job bulletins, websites, professional magazines, industry trade journals, professional organizations, public sector newsletters, etc.

The approach we recommend taking is to place priority on job-related professional publications online job postings versus printed line ads. Finally, we will post ads on appropriate social media outlets, such as LinkedIn, one of the premier recruiting tools in the current labor market.

Deliverable 4. Prospect Identification

Additional search strategies will be developed in conjunction with the approaches above and the initial organizational assessment. With management recruitments, we believe that it is critical to develop a high level of visibility with a focused search and sourcing approach supplemented by a comprehensive outreach program.

Having worked in the public sector for 35 years, we have established excellent relationships with many agencies and their management teams. Using our internal network, we discreetly solicit recommendations and contact individuals meeting our criteria who may not be actively seeking other employment. Time and again, this has proved to be a valuable candidate source that is used concurrently with more traditional external sourcing strategies.

Our team uses a variety of professional recruiting tools to identify and attract out of network prospects. Tools include LinkedIn Recruiter, Indeed Professional, Zoho Recruit, SourceHub, Hiretual—a professional sourcing automation tool, and various Boolean string-builders and social media aggregators for diverse sourcing of the web. We will also use industry-specific job networks that provide searchable candidate databases.

When entering into new projects, our team researches the market to identify synonyms to keywords, a list of similar government agencies and their URLs, as well as association sites and universities that offer relevant programs.



We will develop a list of prospects to target based on our sourcing, contacts, referrals, and recommendations from key sources. The individuals on the prospect list will be directly contacted and encouraged to apply for the position. The goal is to recruit candidates from diverse backgrounds utilizing local, regional, and statewide resources. We will track our search history and present the results using visually friendly data and graphics for our clients to review.

K&A has built a reputation for being an expert in identifying, targeting, recruiting, and successfully placing women and minority candidates in many of our recruitments. Our firm has developed a vast pool of resources at our fingertips when designing a successful advertising campaign that targets women and minorities. Over the years, we have developed effective social media strategies to get the word out about the recruitments we manage by targeting professional groups and individuals on LinkedIn.

Deliverable 5. Contact of Potential Candidates

To further detail the task described above, our effort will include a variety of activities designed to attract the best available candidates. K&A will design messaging campaigns specific to the demographics the recruitment is targeting, and send our campaigns with precise timing, such as weekday evenings:

- ❖ Contact professionals to identify outstanding potential candidates for the position of General Manager;
- ❖ Provide each potential candidate with access to the recruitment brochure; and
- ❖ Contact potential candidates by telephone to explain the career opportunity, answer questions, and encourage them to submit a résumé and application.

When in conversation with candidates, our team will prepare people regarding the District's needs, priorities, strengths, and challenges. We will set clear expectations that the District is looking for a candidate with strong leadership skills, adaptability, political astuteness, self-awareness, and the ability and willingness to set organizational standards and objectives.

Phase 2: Application Review and Presentation

Deliverable 6. Review of Applications and Assessment of Candidates

As requested, we require applicants to submit a fully completed application form, a résumé and cover letter, a supplemental questionnaire, and any other information that applicants would like to add.

After application materials are received, we prepare a thorough assessment of the merits of each candidate and their appropriateness for hire, including their professional and educational credentials. Initially, candidates and application materials are carefully evaluated based on an objective and clearly defined factor ranking analysis that incorporates the concerns and issues previously discussed, as well as the specific requirements of the job description. All elements from the initially developed position profile will be incorporated in our Applicant Rating Matrix, including required experience, education, licenses/certifications, knowledge, skills, and abilities; ideal candidate competencies, experiences, and characteristic profiles; and experiential and professional attributes required of and priorities for the new incumbent. Candidates are also ranked against each other and a numerical score that clearly distinguishes the most qualified candidates recommended for further consideration.



Deliverable 7. Presentation of Prospects

We will present a summary of the evolving applicant pool using visually friendly data throughout Phase 2 and at the conclusion; and ultimately a recommendation as to whom to move forward with. The team will agree on the number of prospects that they would like the consultant to schedule for consideration. K&A will facilitate the process with the District's Ad-Hoc Search Committee to review the recommended group of candidates.

Phase 3: Facilitation of Interview Process

Deliverable 8. Evaluation of Prospects through Initial Screening and Preliminary Interviews

Top candidates for the General Manager position will initially be screened by means of a telephone interview to further assess their experience and qualifications, as well as potential cultural fit based on our understanding of important intangibles, to clarify any issues identified in the submitted documents; reasons for position interest will be identified; the level of commitment to the position and the organization will be determined; and other issues, including salary requirements will be discussed.

In addition, top candidates may be personally interviewed to further narrow the pool to only the most highly qualified candidates and to further establish best organizational fit of each potential finalist. This screening process is specifically designed to assess the personal and professional attributes the District has identified and will focus on each candidate's management ability, technical competency, fit with the District's values, culture, needs, the candidates' behavioral styles and situational experience, and other relevant characteristics.

This process will include an initial assessment of each candidate's leadership skills, adaptability, political astuteness, self-awareness, and other important aspects of the ideal candidate profile, such as whether or not the candidate has a wide-ranging perspective and perceives their role as one of shaping the District's organizational culture.

Deliverable 9. Slate of Recommended Candidates

K&A will submit for review by the key stakeholders, clear written recommendations and analysis of the most qualified applicants as finalists. Our recommendations will include all relevant data submitted by the applicants, such as application forms, cover letters, résumés, and any additional relevant information the applicants have submitted. In addition, we provide our detailed assessment from each of the various steps of the assessment process, as outlined above.

Deliverable 10. Coordination of, and Participation in, Applicant Interviews

Working with the Ad-Hoc Search Committee, we will develop a set of key questions that will help analyze the candidates' qualifications and management/work style. We will complete all of the necessary communications with the interviewing panel, so that all parties are well-prepared for the interviews.

Our firm will provide oversight during the interview process and facilitate a focused discussion among interview panel members at the conclusion of the interviews to identify the most qualified candidates for



final consideration. Our facilitation skills usually prove useful in the assessment of candidates at the end of the interview process.

Interview questions will be designed to elicit information, not only about each candidate's technical skills and experience but also their leadership skills, adaptability, political astuteness, self-awareness, and other important aspects of the ideal candidate profile.

We will ensure that we design questions that are both situational as well as behavioral in order to allow each candidate to share information of instances when they encountered problems and difficult situations in the past, how they overcame them, and what they learned.

This line of questioning will also elicit information about what candidates would do in certain situations, and we will want to ensure candidates provide very specific and detailed examples.

Phase 4: Offer Stage and Conclusion

Deliverable 11. Background and Professional Reference Checks

K&A will conduct extensive reference and background checks for the final candidate(s). We start with employment and professional references, calling each and having an in-depth discussion covering strongest business characteristics, work style, interpersonal skills, and position-specific knowledge.

If requested, we will also perform a public records search, Internet, media and newspaper searches. We work with a background checking firm that can confirm educational degrees and check driving records, criminal records and a financial history/credit check. We, as well as our background contract firm, meet or exceed all of California's extensive reporting requirements. If preferred, background and professional reference checks can be completed before candidates are presented for the oral interview process with a panel (Project Deliverable #10 above).

Deliverable 12. Final Interviews: Coordination of Final Interview Process

Our experience is that often the interview panel will narrow the field of candidates to two or three finalists who are asked back for a more informal second and final interview. This may include meeting other District staff, touring facilities and/or offices, and spending more quality time with the Board of Harbor Commissioners, and other stakeholders.

Deliverable 13. Negotiation of Terms and Conditions of Employment

If desired, our firm is available to assist in the negotiations of the final terms and conditions of employment, such as the compensation package, benefits, and other "perks" (perquisites).

Deliverable 14. Maintenance of All Required Legal Documentation

We are responsible for ensuring compliance with and establishing and maintaining all legally mandated documentation throughout the process.



Deliverable 15. Completion of all Correspondence

We believe that each candidate, regardless of their qualifications and success in the selection process, deserves the courtesy and respect of being informed throughout the process. Applicants receive ongoing communications via our office, which not only keeps all the candidates abreast of the process and their continued candidacy, but also enhances the District’s reputation and image of being considerate, thoughtful, and professional.

Deliverable 16. Maintenance of Regular and Ongoing Communications

Our #1 priority is meeting the District’s needs. Regular, ongoing dialogue with the key decision makers is integral and critical to successfully managing a recruitment campaign. We will provide progress reports to the District’s Ad-Hoc Search Committee at critical points in the recruitment process or as issues arise. Reports shall describe our progress in meeting the goals of the scope of services and issues. We will be responsible for scheduling, coordinating, and preparing all of the necessary materials for the key stakeholders, and other meetings throughout the duration of the process.

Deliverable 17. Post-Employment Support

In addition to the steps of the process leading to an offer of employment to the top candidate, we are committed to ensuring that the new incumbent’s transition into the new position will be smooth and successful. Our team sends formal requests for feedback using K&A’s Placement Evaluation Forms at the six-month and one-year anniversaries of the new hire’s employment commencement date to document and ensure the success of the new employee.

❖ **DIVERSITY RECRUITING STRATEGY:**

Having conducted countless executive search efforts has made K&A an expert in identifying, targeting, recruiting, and successfully placing women and minority candidates in many of our recruitments. Being a State-registered small business, our firm has a vast pool of resources at our fingertips when designing a successful advertising campaign that targets women and minorities. These resources include a network of diverse professionals from whom we can request referrals, job boards geared toward minorities and women, and a pool of candidates from prior recruitments that includes a diverse set of candidates. In addition, we have worked with other clients who value diversity and have requested specific strategies such as assembling interview panels that include diverse populations.

❖ **CONFIDENTIAL SAFEGUARDS:**

The advantage of hiring a recruitment firm is that the bulk of all documentation and recordkeeping will be done by us and only very specific information and documents will be shared with the key stakeholders. Our main contact person and channel of communication with the District will be the Ad-Hoc Search Committee or other designee. In addition, we will conduct orientation and briefing sessions with other stakeholders during which we will discuss how important confidentiality is when it comes to the



recruitment and that documentation should only be shared with the recruiting consultant and Ad-Hoc Search Committee or other designee, etc., not third parties.

We understand that confidentiality is one of the utmost important values when it comes to all things HR-related. We also understand the potential sensitivity of job applicants' information, especially when they are currently still employed and don't want their employer to learn about their job search activities, or cases where job candidates potentially know each other.

Of course, we will never share job candidate information or application documents with any third parties. We will only contact job candidates' current employers with their express permission (although we typically require such during the final background and reference checking, at the latest when a conditional job offer has been made). When it comes to the interviewing process, we are also sensitive to the fact that some candidates may know each other and we try to schedule interviews in neutral locations that have multiple entrances/exits to avoid candidates passing one another.

❖ *INNOVATIVE PRACTICES:*

Our team develops a big picture, third party perspective of the candidate market unique to each position. By taking the time to study the successful qualities of candidates in each niche we understand which backgrounds are relevant and why, enabling us to effectively cement the right placement for your team.

We tailor our outreach according to the specifics of the position using a variety of sourcing strategies across different social media sites, and across the web. Tools include LinkedIn Recruiter, Indeed Professional, Zoho Recruit, Hiretual, SourceHub, Workable, and various Boolean string builders and aggregators for constructing search strings and sourcing the web. We are experienced with organizations of various cultures and climates, and of all sizes and stages. Our goal is to guide placements that create a better workplace.

We put a premium on accurate candidate submissions in order to create efficiency for all parties. We begin the evaluation process with point-factor analysis using our "Applicant Rating Matrix" tool, understanding key competencies. We then complete phone screening interviews so that the slate we present to you includes a full and well-informed picture of each candidate we feel is relevant. We will help develop thorough interview question sets and provide tools and guidance for the interview panel. We are strong negotiators and tailor our approach to suit both the needs of the District and the candidate.

Once there is an accepted offer, we maintain communications with the candidate up to and beyond the date of hire to ensure a happy relationship between employer and employee.



TIMEFRAME

We are able to begin the recruitment process immediately upon receipt and execution of a contract or professional services agreement, or purchase order, etc.

Following is a typical schedule for conducting recruitment efforts. Search efforts of this scope generally take up to four (4) months to complete, allowing enough time for all phases of the process. We understand the District is aware that this recruitment could also take up to six (6) months to find the right candidate and ensure a good fit.

Key Target Points:

Development of Ideal Candidate Profile:	Within 1 week of contract award
Needs Assessment:	1 week from initial meeting
Position Specification and Action Plan:	2 weeks from initial meeting
Develop Recruitment Strategy:	2 weeks from initial meeting
Prospect Identification:	2-6 weeks from initial meeting
Contact Potential Candidates:	2-6 weeks from initial meeting
Assess Candidates:	7 weeks from initial meeting
Presentation of Prospects:	7 weeks from initial meeting
Initial Screening/Preliminary Interviews:	8-9 weeks from initial meeting
Background & Reference Checks:	10 weeks from initial meeting
Recommend Slate of Candidates:	10 weeks from initial meeting
Applicant Interviews:	11 weeks from initial meeting
Coordinate Second Interviews:	12 weeks from initial meeting
Negotiate Terms of Employment:	13 weeks from initial meeting
Offer of Employment:	14 weeks from initial meeting

COST

Our professional lump-sum, Not-To-Exceed fee for the described executive search services for the **General Manager** position at the **San Mateo County Harbor District** is **\$20,000**.

The above fee includes our professional fee **and** the expenses we anticipate as stated below.

Expenses include newspaper, Internet and journal advertisements, recruitment brochure set-up and printing, postage, telephone, background, security and credit check, clerical support, and consultant travel (any cost for candidate travel will not be borne by K&A).

We would expect the following method of payment:

- | | |
|--|-------------------------|
| 1. Completion of all advertising efforts: | 25% of professional fee |
| 2. Completion of application review: | 25% of professional fee |
| 3. Completion of entire interview process: | 25% of professional fee |
| 4. Once offer of employment is made: | 25% of professional fee |



INSURANCE ACKNOWLEDGEMENT

We will submit and support the levels of coverage and endorse the District with our General Liability coverage upon award of a contract for the project.

Workers' Compensation:	Statutory Limits
Commercial General Liability:	\$2,000,000 per occurrence
Professional Liability (Errors & Omissions):	\$1,000,000 per occurrence
Automobile Insurance:	\$1,000,000 per occurrence

Our insurance broker is Ms. Eileen Hollander, Sr. Account Manager/Commercial Lines, Integro Insurance Brokers, 2300 Contra Costa Blvd., Suite 375, Pleasant Hill, CA 94523.

K&A PROMISE (Placement Guarantee)

K&A is committed to finding only the most qualified candidates for the **General Manager** position who not only meet all the necessary requirements and qualifications but are also a cultural fit for the District and its staff. We aggressively and proactively recruit for each search effort until a successful candidate is placed.

We therefore promise to present a slate of candidates to the District that includes only those individuals who have passed through all of our screening processes and have been identified as potential ideal matches for the position requirements. Should the key decision-makers disapprove of all final candidates and/or should none of the final candidates pass the final interview and reference check process, we will work to find a new slate of candidates.

In addition, we promise to conduct a one-time additional executive search to find a replacement should the incumbent leave the position or be terminated from employment within twelve (12) months of hire due to performance issues. In either case, as described above, we will identify a replacement and only charge through related expenses as described in the Cost Proposal.



Signature Page

Koff & Associates intends to adhere to all of the provisions described in RFP # 2019-01.

This proposal is valid for ninety (90) days.

Respectfully submitted,

By: KOFF & ASSOCIATES
State of California

Georg S. Krammer
Chief Executive Officer

January 18, 2019





APPENDIX

Résumés of Participating Recruitment Staff

Georg Krammer
Richard O'Donnell
Frances Trant
Sarah Nunes

Georg S. Krammer

KEY ACHIEVEMENTS AND HIGHLIGHTS

- **Chief Executive Officer:** At HR consulting firm, Koff & Associates, moved from junior role to Senior Project Manager position and, subsequently, became CEO and one of two principals of the firm; worked with over 400 clients on projects with a 100% success and implementation rate. Led company in all recruitment efforts for clients (ongoing).
 - **Human Resources Director/Recruiter:** At IT and e-commerce consultancy, Primitive Logic, was part of building the team from 20 employees to 50; implemented entirely new HR infrastructure.
 - **Administrative Officer:** As a member of Senior Management team of Mission National Bank, turned Bank around from years of losses to profits within six months, as well as substantially improved rating with regulatory authorities. Established best practices and operational efficiencies in HR department.
-

PROFESSIONAL EXPERIENCE

Koff & Associates, Berkeley, CA

Associate and Senior Project Manager, 2003-2005

Chief Executive Officer, 2005-Present

- Serve as Project Director in conducting hundreds of classification, compensation, and organizational studies, as well as executive and staff recruitments; provide strategic planning services for public sector agencies; provide offsite human resource function.
- Recruit executive level positions for water and sanitation districts, courts, counties, cities, transportation agencies, housing agencies, and other statewide and local agencies.
- Develop complex, detailed proposals for cities, counties, courts, and special districts, such as housing, school, healthcare, air quality, vector control, transportation, water, and wastewater agencies to provide professional Human Resources consulting services.
- Represent Koff & Associates with clients, write and approve final project reports, develop client recommendations, and lead presentations in front of and provide expert advice and counsel to City Councils, Boards of Commissioners, Boards of Supervisors, Boards of Directors, and other governing bodies.
- Manage and develop staff of project managers, data specialists, firm consultants, marketing and administrative analysts in Berkeley headquarters and various satellite offices throughout the State.
- Grew company from serving approximately 100 clients to 400 clients and grew staff from 4 to 24 in period of twelve years.
- Contributed to and maintained 100% successful implementation rate of studies performed for clients.

Primitive Logic, Inc., San Francisco, CA

Human Resources Director, 2000-2002

- Supported 50 employees, focusing on organizational development, program implementation, and coaching, resulting in an efficient and healthy organization.
- Pulled all HR functions under one umbrella, thereby allowing executive management to focus on company operations.
- Managed entire recruiting process and coordination resulting in the company's growth of over 100% within one year.

- Planned, directed and carried out employment policies with the goal of reducing cost, safeguarding company culture, and keeping employee morale high.
- Handled all employee relations issues to ensure a productive work environment and to minimize company liability: grievances; counseling; workplace investigations; terminations.
- Created a structured termination process resulting in smoothly administered workforce reductions.
- Managed and redesigned all employee services: new-hire orientation; benefits; employee reviews; employee mentoring program; training; employee morale; record-keeping.
- Created all employment related contracts: offer letters, non-disclosure agreements, stock option agreements, independent consultant contracts; separation/release-of-claims agreements.
- Managed applications for immigration visas, including H-1B's and Labor Certifications.

Mission National Bank, San Francisco, CA

HR Manager/Administrative Officer, 1998-2000

- As Executive Officer and member of Senior Management team, served as HR Manager, Bank Security Officer, Bank Secrecy Act Officer, Administrative Officer, Supervisor of Merchant Credit Card Program, Supervisor of Research, ACH and check processing, and provided back-up for MIS troubleshooting and other technical issues; supervised two people.
- As head of HR department, redesigned HR infrastructure, and the following HR functions: training, payroll, compensation, benefits administration, employee grievance and conflict resolution.
- Maintained and implemented updated employment policies. Responsible for hiring, new-hire orientation, and terminations. Advised Senior Management and Board of Directors on HR issues, labor law updates, business conduct and ethics, as well as compensation structure to ensure legal compliance, adherence to overall business goals, reduction of cost, and employee retention.

PROFESSIONAL AFFILIATIONS

- California Public Employer Labor Relations Association
- National Public Employer Labor Relations Association
- Public Employer Labor Relations Association of California
- International Public Management Association
- Society of Human Resource Management
- Northern California Human Resource Association
- California Chamber of Commerce
- California Association of Sanitation Agencies
- California Special Districts Association
- League of California Cities

EDUCATION

MBA – International Business, University of San Francisco, Beta Gamma Sigma Honorary Society

MA – English and Russian languages and literature; teaching credentials; University of Vienna, Austria

SPHR – Senior Professional Human Resource Certificate

Richard L. O'Donnell

PROFESSIONAL EXPERIENCE

Koff & Associates, Berkeley, CA

Senior Recruiter, June 2017 - Present

- Perform full-cycle recruitment and placement for senior management, financial, technical, compliance management, etc. candidates for public-sector agencies.
- Support clients through the full-cycle recruitment process – from job advertising, candidate sourcing, candidate review, interview facilitation, and candidate selection.
- Conduct in-depth analyses of the relevant candidate market.
- Present data in an organized, visually-friendly manner using professional recruiting methodology, technology, and tools to facilitate decision-making during the hiring process.
- Focus recruitment methods to best match the needs of our clients and provide sound advice throughout the search.

Apttus (COIT Group RPO), San Mateo, CA

Senior Technical Recruiter, April 2016 – June 2017

- Maintained a high volume of requisitions, including the organization of critical data and sourcing.
- Consulted with a variety of stakeholders, including hiring managers, interview panels, admins, executives, and internal HR to facilitate the integrity of the recruitment process.
- Worked with candidates throughout the life-cycle of candidacy to ensure a positive experience.

Millennium Search, San Francisco, CA

Senior Technical Recruiter & Managing Partner, April 2013 – April 2016

- Provided advice and guidance, and developed comprehensive hiring plans in collaboration with clients.
- Developed creative recruiting strategies designed to foreshadow staffing needs.
- Focused on highly accurate candidate outreach and submissions to ensure efficiency for respective parties.

Workbridge Associates, San Francisco, CA

Senior Technical Recruiter, February 2011 – April 2013

- Managed the entire recruitment process across multiple technologies.
- Employed a consultative and collaborative approach with candidates and clients alike to be a “solution provider”.
- Identified and manufactured key relationships by recognizing clients’ needs and providing full life cycle recruiting services.

Infinity Financial Services, Oakland, CA

Business Development Manager, January 2010 – February 2011

- Used CRM software to assist in determining appropriate portfolio allocations.
- Called prospects, scheduling multiple introductory phone calls daily.
- Worked directly with a certified expert in learning a consultative style sales approach.

EDUCATION

University of California, Santa Cruz, Santa Cruz, CA

B.S., Economics & Accounting

SARAH NUNES

PROFESSIONAL EXPERIENCE:

May 2017 – Present

Consultant, Classification & Compensation, Koff & Associates, Berkeley CA

Perform classification and compensation studies for a variety of public sector clients, including special districts, cities, and counties.

- Conduct in-depth analysis of classifications and positions, including job evaluation interviews, identifying and defining classification concepts, developing and modifying classification specifications, and recommending position allocations; perform comprehensive analysis of duties performed in individual positions to determine allocation and/or reclassification.
- Perform base salary and total compensation data collection and analysis.

May 2004 to March 2017

Employment Division Manager, City of San Jose Human Resources, San Jose CA

Responsible for direct provision of all recruitment and staffing needs for 21 departments

- Managed a team of four Senior Analysts and 10 Analysts plus clerical support staff.
- Managed classification and compensation services.
- Coordinated executive recruitments through in-house and consultant services.
- As necessary, managed placements, bumping, redeployment and layoffs of employees displaced because of budget reductions.
- Coordinated with Employee Relations and Workers' Compensation staff to determine reasonable accommodations and/or placement assistance for employees with work restrictions.

January 2001 to May 2004

Senior Analyst, City of San Jose Human Resources, San Jose CA

- Supervised team of 4 Analysts and 1 Staff Technician in planning and administering recruitments for 21 City Departments.
- Working in a decentralized hiring environment, supported, advised and trained department personnel liaisons in recruitment and selection.
- Provided technical expertise to Departments on interpretation of Civil Service rules relating to recruitment and selection

June 1997 to January 2001

Analyst, *City of San Jose Human Resources, San Jose CA*

- Developed and administered all phases of the recruitment and selection process following Civil Service rules and Hiring Pilot Project guidelines, including recruitment planning, application screening, test development and administration, scoring and production of eligible lists.
- Reviewed qualifying promotions, Temporary Employee requests and performed classification actions, as needed.
- Client Departments were Fire, Parks and Recreation, and City-wide Maintenance. Major recruitments developed included Maintenance Assistant, Firefighter Recruit and Fire Department promotional exams (all levels).

EDUCATION:

- Master of Arts, Anthropology – California State University, Chico
- Bachelor of Arts, Anthropology – Beloit College, Wisconsin

PROFESSIONAL CERTIFICATIONS:

- IPMA-HR, Senior Certified Professional, 2007 - 2016

FRANCES TRANT, SPHR, SHRM-SCP

Professional Experience:

Senior Recruitment Consultant / Senior HR Consultant

Koff & Associates, Berkeley, CA

April, 2018 – Present

- Provide résumé and application screening and review for executive level candidates applying for executive level positions with our client agencies.
- Develop and customize interview content for executive level candidates.
- Conduct interviews of executive level candidates applying for executive level positions.
- Perform compensation surveys, classification studies, and organizational studies for the public sector.
- Create job descriptions incorporating ADA and FLSA requirements.
- Deliver guidance to public sector management on wide variety of human resource issues.
- Update policy and procedure handbooks for public sector agencies.
- Design and deliver content for professional workshops led by K&A executives at HR industry events.

Special HR Advisor, Personnel Services, Contra Costa County, Health Services

2/2018 – 4/2018

- Conducted needs analysis, designed and delivered team building services and executive level coaching.

Interim Executive HR Director, UC Hastings College of the Law, San Francisco

11/2016 – 12/2017

Member of Executive Leadership team; successfully delivered numerous people management projects.

Improved quality and quantity across full range HR services for 425 faculty, staff and student employees.

- Implemented quality control processes to improve payroll input quality and timeliness by >98%.
- Co-led implementation of time and attendance system to accurately record hourly paid and salaried employees' time. Conducted meet-and-confer sessions with unions to explain new system.
- Negotiated administrative staff, and Librarians' collective agreements, ensuring wage and benefit plans were sustainable within College financial ecosystem and agreement language focused on College success.
- Implemented State & Federal risk mitigation/legal compliance: Harassment-Discrimination prevention training; comprehensive Fair Labor Standard review in preparation for accurate bi-weekly and monthly pay periods; ensured faculty and staff followed FMLA processes, Workers' Compensation processes; annual and probation period evaluations conducted; employee effectiveness counselling services delivered as needed.

HR DIRECTOR, UCSF Benioff Children's Physicians (UCBP), San Francisco

5/2016 – 8/2016

- Established UCBP's comprehensive HR program: created job descriptions, conducted salary research, recruited clinic professional/support personnel, managed leave, and coached leaders.
- Implemented e-time and attendance system to ensure optimum deployment of hourly paid staff
- HR leadership for acquisition of large clinic and merged staff into UCBP environment.

HR GENERALIST, Tenderloin Neighborhood Development Corporation

10/2015 – 1/2016

- Delivered full range of benefit services in open enrollment environment of new broker and new health plans; 100% employees understood what was best plan(s) for them.
- Designed and implemented process to identify employee funds allowed to be borrowed from 403(b) program mitigating risks identified by auditor.

HR & Training Director, Housing Authority of the County of Contra Costa 2009 –2015

Delivered comprehensive HR services: employee / labor relations, State and Federal risk mitigation/legal compliance, staffing, benefits, all types of employee leave, and safety program.

- Increased team capacity by 60% by automating and moving payroll, time reporting and applicant tracking from spreadsheet to the cloud-based services in unionized environment.
- Executed transition from expensive self-insured health benefits to joining CalPERS Health benefits saving \$200 - \$800/month per enrolled employee.
- Negotiated three sets of collective agreements without any work action or strikes.
- Researched and presented information to Board of Supervisors during union negotiations and CalPERS health benefits implementation.

PERSONNEL ANALYST III - Contra Costa County, Health Services Department 2004 – 2009

Organization Development:

- Initiated and executed strategic evaluation, design and implementation of organizational development and effectiveness programs throughout 4,000 employee department.
- Awarded **GEM** (“Going the Extra Mile”) distinction for impact of Department-wide effectiveness interventions and nominated “Manager of the Year” in 2007 out of pool of 250 possible candidates.

Employee Relations – County hospital and County-wide clinic system:

- Delivered daily labor/employee relations, investigations, recruiting support, compensation/salary guidance.
- Negotiated collective agreement with California Nurses Association without any work action or strike.
- Conducted salary analysis for nurses and other health care professionals.

Training Coordinator; Mt. Diablo Unified School District (59 schools), Concord, CA 2002 – 2003

- Analyzed needs, designed, delivered and evaluated training programs for “classified” staff.
- Recognized by Superintendent’s Leadership team and unions as “Delivering Best Training Ever!”

Trant and Associates; Strategic OD/HR Consulting 1997 – 2002

- Clients included Canadian Blood Services, American Red Cross, World Bank assignments in Washington and Brazil, and organization effectiveness for various owner operated businesses.

Education:

- Executive Program, University of Toronto Rotman School of Business, Toronto, Canada; four-month highly focused mini MBA for senior managers
- Post BA-Certificate in Labor Management Relations; University of Ottawa, Ottawa, Canada
- Honors B.A., University of Guelph, Guelph, Canada

Industry and Community Contributions:

Facilitate both HRCI & SHRM National HR Certification Preparation courses 2003 – Current

- 36 – 40 hours of content covering whole spectrum of best practice HR knowledge and competencies.
- 98% of students pass demanding four (4) hour national certification exams.

Member of Contra Costa Health Plan Board of Commissioners. 2009 – ongoing

- CCHP is an HMO that delivers wrap-around health services for county residents.