



May 17, 2023

Village of Elm Grove, Wisconsin

Proposal to provide a responsive, well-managed and thorough search process to recruit and identify highly qualified candidates for your next Village Manager

**Village of Elm Grove, Wisconsin
Proposal to Provide Recruitment Services
For the Position of Village Manager**

I hereby certify that I am authorized to make this offer on behalf of the named company and to bind said company to this proposal. By submitting this proposal, I hereby represent that the firm identified below is fully qualified to perform the services described to achieve the organization's objectives in a professional manner.

Name of Firm **Baker Tilly US, LLP**
Address **30 East 7th Street, Suite 3025**
City/State/Zip **St. Paul, MN 55101**
Signature 
Name (Print) **Anne Lewis**
Title **Managing Director**
Telephone Number **+1 (703) 923 8214**
E-Mail Address **anne.lewis@bakertilly.com**
Date Submitted **May 17, 2023**

PRICE PROPOSAL

Total Cost of Activities - All costs related to travel, supplies, etc., are to be included.

Total, not-to-exceed cost: \$ **26,950**



May 17, 2023

David De Angelis
Village of Elm Grove
13600 Juneau Boulevard
Elm Grove, WI 53122

Baker Tilly US, LLP
30 East Seventh Street Suite 3025
St. Paul, MN 55101
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bakertilly.com

Delivered electronically

Dear Mr. De Angelis:

This proposal marks the beginning of a valuable relationship we plan to build with the Village of Elm Grove (the Village). Based on what we have learned from you in your request for proposal (RFP) process, we are confident we are the right fit to serve you in selecting your next Village Manager with forward-thinking executive recruitment services so you can keep your focus where it belongs: serving your community. Our proposal meets your RFP requirements and describes our unique proposition to enhance and protect value while meeting your key objectives.

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

We know that you have options for selecting a recruitment firm. However, we believe that our unique approach, highly regarded customer service practices, and our record of identifying and recruiting top-level executives in similar roles set us apart from our competitors. Additionally, we offer the following unique features:

<p>The right firm</p> <p>Elm Grove will benefit from our best-of-both-worlds solution that pairs the technical qualifications, tools and expansive resources of the largest firms with the responsive service, personalized attention and proactive communication of smaller firms.</p>	<p>The right experience</p> <p>Our firm is structured around industry-specialized practice groups, allowing us to provide focused training and continuing education to our team members. Our understanding of your organization, paired with targeted experience, will help Elm Grove thrive.</p>	<p>The right team</p> <p>Your team includes technical and industry-specialized team members who understand your organization's requirements, challenges and opportunities. You will receive a tailored recruitment approach designed to meet your needs and exceed your expectations.</p>	<p>The right value</p> <p>We provide high-quality service for a fair and reasonable fee. Our significant level of project team leader involvement translates into a responsive, efficient recruitment and the ability to deliver value throughout the engagement.</p>
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- Customized profile development:** Working with the members of the Village Board and designated staff, we develop a customized candidate profile based on the required, desired and preferred qualifications, traits and attributes you seek in the individual you interview or hire for your next Village Manager. We strive to understand how the Village of Elm Grove's current and anticipated needs and organizational priorities will shape your recruiting and selection requirements. We collaborate with you to develop a nationwide or regional marketing, recruiting and outreach campaign. This approach will effectively allow us to identify, attract and recruit highly qualified candidates for your review.

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- **Management/leadership assessment:** Relying on exclusively licensed predictive analytics tools (using data to determine patterns and forecast future outcomes and trends), we administer assessments to selected applicants to help us identify human potential in each candidate we present to you. Results are “Real,” “Impactful,” and “Powerful.” Furthermore, based on scientific data, these results can provide more profound insights into the candidate’s management traits and leadership styles.
- **Recorded video interviews:** We ask selected candidates (semi-finalists) to complete a recorded, one-way video interview using questions developed from your “candidate profile,” which gives your review team an additional tool to evaluate the semi-finalists before inviting them to a face-to-face interview.
- **Online application management:** We use NeoGov as our online application system. It provides for efficient management of applications and allows us to communicate in real time with applicants, engaging and informing them of each step in the search process. Within this system, we can access, review and evaluate prior applicants or individuals who have expressed interest in similar positions. Generally, these individuals may not be actively seeking a job but may be open to “the right opportunity.” This is another benefit and advantage we provide our clients, enabling us to access more passive job seekers.

This proposal details our approach, expertise, references and pricing for this executive recruitment. Our team would consider it a professional privilege to provide these services to the Village of Elm Grove.

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

Very truly yours,

BAKER TILLY US, LLP



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



Patty Heminover, Director
+1 (651) 223 3058 | patty.heminover@bakertilly.com

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

Controller



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1. Introduction

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

1. Introduction – Provide the official name, address, phone number, and email of the consulting firm, as well as the name of the principal contact person and the name of the person authorized to execute the contract.

Official name, address, phone number, and email of the firm

Baker Tilly US, LLP
205 N Michigan Ave, 28th Fl
Chicago, IL 60601-5927
+1 (312) 729 8000
bakertilly.com

Name of the principal contact person

ENGAGEMENT TEAM LEADER

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

Name of the person authorized to execute the contract

AUTHORIZED REPRESENTATIVE

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

2. Experience and qualifications

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

a. A brief description of the organization.

Offering our resources: Baker Tilly at a glance

We dedicate ourselves to delivering efficiency, quality, creativity, innovation and forward-thinking solutions. We are passionate about enhancing and protecting our clients' value, which is a collective effort by everyone across our firm. The Village of Elm Grove will receive an exceptional experience for your management team, governance team, and — ultimately — those you serve. Below are some key facts about our firm.



550+
administration
recruitments



1,675+
recruitments
since 2000



60+
office locations
across the U.S.



250+
workplace and
culture awards

COMPREHENSIVE EXPERIENCE TO SERVE YOU

Elm Grove will receive support and guidance from a respected firm that continues to grow — as evidenced by INSIDE Public Accounting naming Baker Tilly as the 10th largest accounting firm in the United States on their 2022 IPA Top 100 list.

Celebrating more than 90 years serving our valued clients

As a future-looking firm, we celebrate more than 92 years in the marketplace by honoring our roots and continuing to shape our future. We embrace the fact that business can't stand still — and we won't stand still. As we help our clients identify new needs and opportunities, we innovate and change to work better.



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

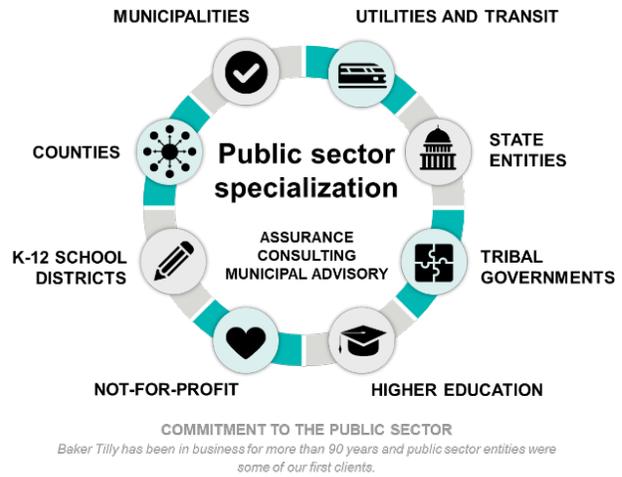
As we reimagine our lasting impact, we remain grounded in our timeless core values. Through dedication, creativity and adaptability, Baker Tilly will become more connected to our clients, our people, our communities and our profession.

2. EXPERIENCE AND QUALIFICATIONS

Public sector specialization

Baker Tilly has served local governments since our establishment more than 92 years ago. We are one of the few professional services firms with a state and local government practice dedicated entirely to serving governmental clients.

Unlike many of our contemporaries, Baker Tilly is organized by industry, not service line. What does this mean for Elm Grove? It means you will be served by a carefully selected team that blends our government-focused professionals with experienced specialists in executive recruitment projects. The Village will collaborate with knowledgeable professionals who your challenges and provide innovative solutions to help you overcome them.



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

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

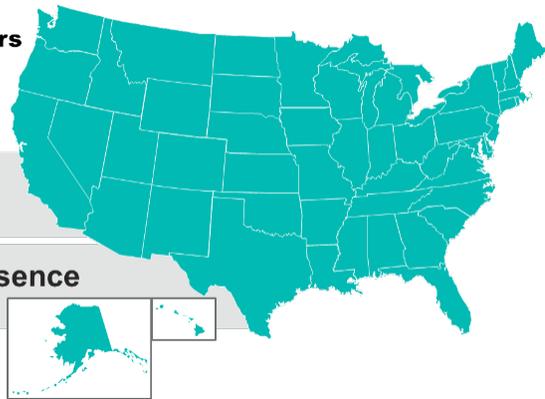
Public sector: experience that matters

nearly
4,000
public sector clients

90+ years
industry experience

Coast-to-coast presence
Industry trainers and thought leaders

States where Baker Tilly has served public sector clients



Celebrating our recent combination with Management Partners

The fast pace of change in local government – from towns to cities to counties – is not slowing down. To continue serving and improving communities, local leaders need trusted consultants to help navigate change. Leading advisory CPA firm Baker Tilly answers by acquiring Management Partners, effective October 1, 2022.

This acquisition adds a unique and significant layer of experience to Baker Tilly's robust public sector practice. These project team members are former local government leaders and managers stemming from all operational facets. They have nearly three decades of field-tested techniques and proven methodologies.



Additional organizational management and human capital services

PLANNING AND STRATEGY	MANAGING AND PERFORMANCE
<ul style="list-style-type: none"> • Position classification studies 	<ul style="list-style-type: none"> • Compensation and benefit systems
<ul style="list-style-type: none"> • Organizational improvement studies 	<ul style="list-style-type: none"> • Personnel policies
<ul style="list-style-type: none"> • Resource sharing 	<ul style="list-style-type: none"> • Career ladders
<ul style="list-style-type: none"> • Strategic workforce planning 	

MEETING ELM GROVE’S HUMAN CAPITAL NEEDS

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

Standing on our values

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

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

SHARED CULTURES, VALUES, PHILOSOPHIES AND GOALS

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

For additional information on Baker Tilly’s prioritization of Diversity, Inclusion and Belonging for Success (DIBS), please see **Appendix A**.

2. EXPERIENCE AND QUALIFICATIONS

b. A brief description of the experiences and qualifications of the proposed staff member(s) who will be performing the services.

Aligning key engagement team members with your goals

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

Within Baker Tilly, our executive recruitment team consists of ten recruitment consultants and project coordination staff available to meet your executive recruitment needs. Each consultant assigned to your recruitment has experience working with cities, counties, special districts, not-for-profit organizations and school districts, and the many disciplines comprising the Village of Elm Grove organization. Our consultants bring an experienced, participatory and energetic perspective to each engagement. As such, we reflect our unique approach and individualized touch in our internal standard and commitment to outstanding service that meets or exceeds your expectations. Since 2000, our combined consultant team has conducted more than 1,675 executive searches.

1,675+ recruitments

Your engagement team has conducted more than 1,675 successful recruitment projects since 2000.

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

We have structured the Baker Tilly engagement team to draw upon our 90-plus years of collective service to the public sector and to leverage Baker Tilly's experience and capacity to find exceptional, qualified candidates.

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

Your handpicked team of professionals offer a collaborative focus supported by the breadth and depth of our firm's national resources. We believe in strong personal relationships, which means a personal interest in the Village of Elm Grove from some of our most experienced team members.

Engagement team members are introduced on the following pages, and complete resumes are available in **Appendix B**.

2. EXPERIENCE AND QUALIFICATIONS

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR ELM GROVE

Engagement leadership



Patricia Heminover — Director

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

Patty has been with the firm since 2010. She has more than 20 years of public education experience, most recently as superintendent of South St. Paul Schools in South St. Paul, Minnesota. She brings considerable experience developing budgets, leading organizational and process improvements, and successfully overseeing conflict resolution. Patty was South St. Paul Schools' director of human resources and finance before serving as its superintendent. She served for three years as the co-superintendent of schools for Cleveland Public Schools in Cleveland, Minnesota, after working as its director of human resources and business services for six years. Patty has received a School Finance Award and technology leadership awards and helped establish Minnesota's first K-12 International Baccalaureate School District. She earned a Master of Education Administration from Minnesota State University.

Consulting team



Art Davis — Director

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

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



Nancy Hetrick — Managing Director

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

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

2. EXPERIENCE AND QUALIFICATIONS

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR ELM GROVE



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

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

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



Anne Lewis – Managing Director

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

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



Edward G. Williams, Ph.D. — Director

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

Edward has more than 20 years of collective experience in human resources and organizational development at various levels and across multiple disciplines, including state and municipal government, community and educational institutions. His areas of expertise include human development, process improvement, workforce planning, executive recruiting, strategic planning, management and leadership development, classification, compensation, benefits administration, performance management, employee recognition, employee wellness and benefits administration. He has served

2. EXPERIENCE AND QUALIFICATIONS

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR ELM GROVE

as director of human resources and organizational development for the City of Missouri City, deputy personnel director for the State of Missouri and training and performance consultant for the Metropolitan Community Colleges Business and Technology Center in Kansas City, Missouri. Edward holds a Ph.D. in Educational Leadership and Policy Analysis from the University of Missouri, an Educational Specialist degree in Higher Educational Administration, a Master of Higher Education Administration, and a Bachelor's in Education from the University of Missouri. He is bilingual and proficient (reading, writing and speaking) in Spanish.

Supporting team



Karen Edwards, SHRM-CP — Recruitment Analyst

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

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



Michelle Lopez — Manager

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

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



Diane Segulia — Recruitment Analyst

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

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



Carrie Thompson — Recruitment Analyst

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

Carrie is a recruitment analyst with Baker Tilly's executive recruitment practice group. She has more than four years of experience in recruiting coordination, including interview scheduling and candidate communication. She facilitates smooth sailing during the recruitment process. Carrie runs reports, coordinates outreach and organizes

2. EXPERIENCE AND QUALIFICATIONS

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR ELM GROVE

essential documents. Along with her work behind the scenes, she collaborates with clients and candidates to help them on their journey to success. Carrie earned a Bachelor of Arts in communication with a concentration in media production and criticism from George Mason University.

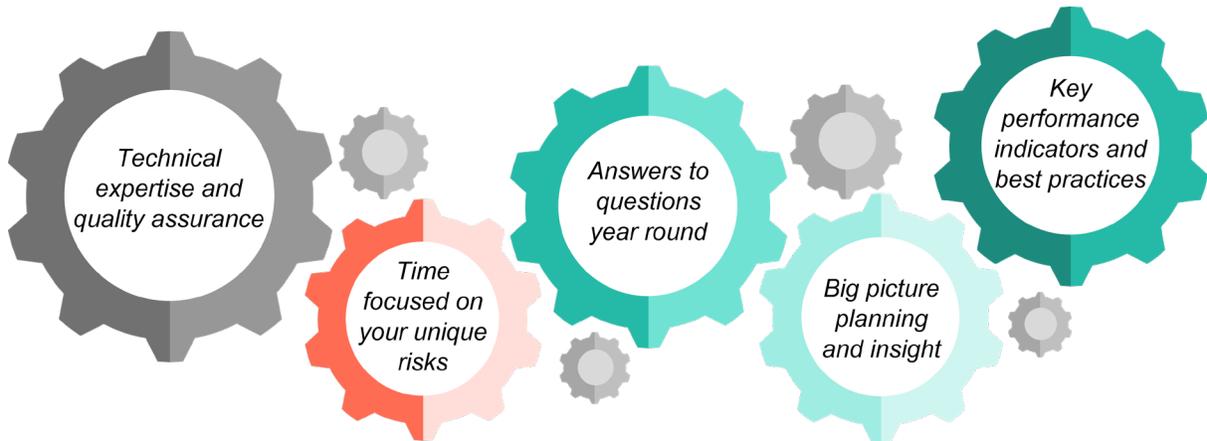
ELM GROVE WILL RECEIVE TANGIBLE RESULTS WITH BAKER TILLY

All engagement team members are committed to Elm Grove's success. Their public sector experience and service expertise translates into tangible results for Elm Grove.

Building trust and maximizing value with significant involvement

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

The graphic below details how we will build trust and maximize value with the Village.



COLLABORATING WITH YOU AS YOUR TRUSTED VALUE ARCHITECT™

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

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

We view our commitment to staff continuity as the cornerstone of building a lasting relationship with Elm Grove. You can expect to see the same engagement team members every year and avoid the time and cost of onboarding a new team.

Exceptional professionals thrive at Baker Tilly because we foster an engaging culture through diversity and inclusion, work-life balance, continuous learning opportunities, career advancement and employee recognition. As evidence of our team member-focused culture, Baker Tilly proudly presents a variety of recognitions and awards. We invite you to click on the video to the right to learn more about Baker Tilly's unique culture.



EMPHASIZING OUR CULTURE

What makes our firm special? The emphasis we put on our culture. We take care of our people so we can take care of our clients.

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

<p>Baker Tilly was included in People Magazine's 2022 Companies That Care list, which recognizes companies who put their employees and communities first</p> 	<p>Recognized as one of America's Best Large Employers in 2021 and 2022 by Forbes</p>  	<p>Received 250+ culture awards and workplace recognitions firmwide</p>      <p>BEST PLACES to work in PA 2022 BUSINESS JOURNAL PHILADELPHIA BUSINESS JOURNAL</p>      
<p>Ranked as a top 10 accounting and advisory firm for workplace prestige and quality on Vault Accounting's Accounting 50 list; culture is the number one reason that team members join our ranks and stay at our firm</p> 	<p>Baker Tilly has again been certified as one of the Best Workplaces in Consulting and Professional Services – one of only 25 companies recognized on this list</p> 	

CULTIVATING AN ENGAGING CULTURE

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

2. EXPERIENCE AND QUALIFICATIONS

c. Names of entities, especially governmental, where these persons have performed executive searches, along with reference contact name and title, telephone number, and email address for a minimum of three recent references for comparable work.

Demonstrating successful relationships with similar clients

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

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

CITY OF WILLMAR			
Name	Leslie Valiant	Title	City Administrator
Phone	320-214-5160	Email	lvaliant@willmarmn.gov

CITY OF SHOREWOOD			
Name	Ed Shukle	Title	Interim City Administrator
Phone	612-269-7-15	Email	

CITY OF BELOIT			
Name	Elizabeth Krueger	Title	City Attorney
Phone	608-364-6623	Email	kregere@beloitwi.gov

PROVIDING VALUABLE PERSPECTIVES FROM CURRENT CLIENTS

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

d. Names of entities, other than above, where your firm has performed executive searches in the past two years, along with reference contact name, title, telephone number, and email address at each entity.

Providing similar services to clients

Below is a partial list of relevant public sector executive recruitments delivered by the Baker Tilly team since 2021.

LIST OF RELEVANT PROJECTS: PRESENT — 2021						
Year	Client	St	Recruitment	Contact	Phone	Email
2023	Belle Meade	TN	City Manager	Rusty Moore	615-297-6041	rmoore@citybellemeade.org
2023	Beloit	WI	City Manager	Elizabeth Krueger	608-364-6623	kregere@beloitwi.gov
2023	Carrboro	NC	Assistant Town Manager	Richard White	919-918-7315	rwhite@carrboronc.gov

2. EXPERIENCE AND QUALIFICATIONS

LIST OF RELEVANT PROJECTS: PRESENT — 2021

Year	Client	St	Recruitment	Contact	Phone	Email
2023	Fargo	ND	City Administrator	Jill Minette	701-241-1334	JMinette@FargoND.gov
2023	Morehead City	NC	City Manager	Jewel Lasater	252-726-6848	Jewel.Lasater@moreheadcitync.org
2023	Wyoming	MI	City Manager	Kim Oostindie	616.261.3539	Kim.Oostindie@wyomingmi.gov
2022	Apex	NC	Assistant Town Manager	Mary Beth Manville	919-249-3420	marybeth.manville@apexnc.org
2022	Beaumont	TX	City Manager	Chris Catalina	409-880-3104	chris.catalina@beaumonttexas.gov
2022	Belton	MO	City Manager	Norman Larkey	816-985-8696	nlarkey@belton.org
2022	Blue Springs	MO	City Administrator	Christine Cates	816-228-0140	ccates@bluespringsgov.com
2022	Branson	MO	City Administrator	Larry Milton	417-699-1014	lmilton@bransonmo.gov
2022	Brevard	NC	City Manager	Kelley Craig	828-885-5608	kelley.craig@cityofbrevard.com
2022	Buda	TX	City Manager	Vicki Fuchs	512-523-1043	vfuchs@ci.buda.tx.us
2022	Denton	TX	City Manager	Carla Romine-Hagmark	940-349-8344	carla.romine@cityofdenton.com
2022	Evans	CO	City Manager	Julie Roeder	970-475-1138	jroeder@evanscolorado.gov
2022	Golden	CO	City Manager	Kristen Meier	303-597-5209	kmeier@cityofgolden.net
2022	Harrisonburg	VA	City Manager	Angela Clem	540-432-8920	angela.clem@harrisonburgva.org
2022	Hastings	NE	City Administrator	Lori Hartman	402-462-3533	ldoose@cityofhastings.org
2022	Hutchinson	KS	City Manager	Tom Saunders	620-694-2620	toms@hutchgov.com
2022	Joplin	MO	Assistant City Manager	Nick Edwards	417-624-0820	nedwards@joplinmo.org
2022	Kinston	NC	City Manager	Jim Cauley	252-291-3848	cauley@cauleypridgen.com
2022	La Marque	TX	City Manager	Chaise Cary	409-938-9213	c.cary@cityoflamarque.org
2022	Minnetrissa	MN	City Administrator	Allie Polsfuss	952-241-2510	APolsfuss@ci.minnetrista.mn.us
2022	Oak Hill	TN	City Manager	Austin Edmonson	615-371-8291	ACM@oakhilltn.us
2022	Oakland	CA	Deputy City Administrators	Ed Reiskin	510-238-3301	ereiskin@oaklandca.gov
2022	Overland Park	KS	City Manager	Kristy Stallings	816-679-0608	kristy.stallings@opkansas.org
2022	Plain City	OH	Village Administrator	Jody Carney	614-873-3527	jcarney@plain-city.com
2022	Port Arthur	TX	Assistant City Manager	Trameka A. Williams	409-983 8213	Trameka.williams@portarthurtx.gov
2022	Rockville Economic Development Inc	MD	Women's Business Center - Managing Director	Cindy Rivarde	315-903-9112	cindy@rockvilleredi.org
2022	Salisbury	NC	City Manager	Kelly K. Baker	704-638-5233	kbake@salisburync.gov
2022	Shorewood	MN	City Administrator	Ed Shukle	952-960-7905	eshukle@ci.shorewood.mn.us
2022	Spicer	MN	City Administrator	Denny Baker	320-894-8949	denny@bprinting.com
2022	Staunton	VA	City Manager	Jon Venn	540-332-3914	vennjg@ci.staunton.va.us
2022	Westminster	CO	City Manager	Nancy McNally	303-468-4707	nmcnally@cityofwestminster.us
2022	Willmar	MN	Assistant City Administrator	Valient, Leslie	320-235-4913	lvaliant@willmarmn.gov
2021	Carrboro	NC	Town Manager	Julie Eckenrode	919-918-7308	jeckenrode@townofcarrboro.org
2021	Clearwater	FL	City Manager	Jennifer Poirrier	727-562-4870	Jennifer.Poirrier@Myclearwater.com
2021	College Park	MD	City Administrator	Teresa Way-Pezzuti	240-487-3536	tway@collegeparkmd.gov
2021	Corpus Christi	TX	Assistant City Manager	Eyvon McHAney	361-826-3979	EyvonMc@cctexas.com
2021	Evansville	WI	City Admin/Finance Director	Bill Hurtley	608-882-4410	bill.hurtley@ci.evansville.wi.gov

2. EXPERIENCE AND QUALIFICATIONS

LIST OF RELEVANT PROJECTS: PRESENT — 2021

Year	Client	St	Recruitment	Contact	Phone	Email
2021	Grand Rapids	MI	Deputy City Manager	Mark Washington	616-456-3165	manager@grcity.us
2021	Greeley	CO	City Manager	John Karner	970-350-9731	John.Karner@greeleygov.com
2021	Huntington Beach	CA	Interim Admin Svcs Director	Brittany Mello	714-536-5537	ocrmdzinfo@surfcity-hb.org
2021	Inver Grove Heights	MN	City Administrator	Amy Jannetto	651-450-2510	ajannetto@invergroveheights.org
2021	Kimball	NE	City Administrator	Annette Brower	308-235-3639	abrower@kimballne.org
2021	Long Grove	IL	Village Manager	Bill Jacob	847-778-5193	bill.jacob@longgroveil.gov
2021	Louisville	CO	City Manager	Derke Price	630-596-4612	dprice@ancelglink.com
2021	Moline	IL	City Administrator	Derke Price	630-596-4612	dprice@ancelglink.com
2021	Riverside	OH	City Manager	Peter J. Williams	937-233-1801	pwilliams@riversideoh.gov
2021	Rockville	MD	Deputy City Manager	Rob DiSpirito	727-638-4140	rdispirito@rockvillemd.gov
2021	Shakopee	MN	Assistant City Administrator	Bill Reynolds	952-233-9311	BReynolds@ShakopeeMN.gov
2021	Sidney	OH	City Manager	Michael Barhorst	937-498-8148	mbarhorst@sidneyoh.com
2021	Stonecrest	GA	City Clerk	Steven B. McClure	470-727-0070	smcclure@stonecrestga.gov
2021	Windsor	CA	Interim Town Manager	Sam Salmon	707-542-2310	ssalmon@townofwindsor.com
2021	Woodlawn	OH	Village Manager	Brian K. Poole	513-771-6130	bpooles@beautifulwoodlawn.us

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

	<ul style="list-style-type: none"> • Baker Tilly begins recruitment advertising and marketing • Online data collection and profile development
Applicant screening and assessment and recommendation of semi-finalists	<ul style="list-style-type: none"> • Baker Tilly commences formal review of applications, and the most promising candidates will be asked to complete questionnaires • Candidates complete recorded interviews online • Baker Tilly completes a formal review of applications and sends selected resumes to the Village Board for review • Candidates' recorded interviews are presented • Baker Tilly meets with the Village Board and recommends semi-finalists; Village Board selects finalists for on-site interviews • Finalists complete candidate management style assessment, responses are reviewed, and interview questions are developed
Comprehensive background checks, academic verifications and reference checks completed for finalists	<ul style="list-style-type: none"> • Baker Tilly completes reference checks/background checks/academic verification on finalists
On-site Interviews with finalists	<ul style="list-style-type: none"> • Baker Tilly sends documentation for finalists to the Village Board • The Village Board conducts on-site interviews with finalists
Employment offer made/accepted	<ul style="list-style-type: none"> • The Village Board extends employment offer to the selected candidate

COMMITMENT TO SUCCESSFULLY DELIVER RECRUITMENT SERVICES TO MEET ELM GROVE'S REQUIREMENTS
Elm Grove's time is valuable. We will co-develop a timeline to provide the Village's executive recruitment services on time.

Meeting your deadlines and budget

Following is a list of projects, at various stages, members of the Baker Tilly public sector executive recruitment engagement team are currently leading. We are confident that, based on our existing schedules, commitments to clients and absolute adherence to our internal standards of service delivery, quality, integrity, efficiency, responsiveness and results, the proposed engagement team leader will be available to begin your executive recruitment on short notice. Typically, we can launch a recruitment within 10 days of receiving the official notice to proceed. In fact, we often complete a recruitment in 120 days depending on the availability to information we may need to meet our mutually agreed-upon schedule.

List of current projects

The Baker Tilly public sector executive recruitment practice is currently working on the following recruitments in various stages.

LIST OF CURRENT PROJECTS			
Client	State	Project	Population
Ann Arbor	MI	Police Chief	123,851
Ashland	WI	Assistant Public Works Director	7,908
Black Hawk County	IA	Public Health Director	132,408
Branson	MO	City Attorney	12,638
Canfield	OH	City Manager	7,605
Carrboro	NC	Assistant Town Manager	21,230

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

LIST OF CURRENT PROJECTS			
Client	State	Project	Population
Carrboro	NC	Fire Chief	21,230
Carrboro	NC	Housing & Community Services Director	21,230
Carrboro	NC	Public Works Director	21,230
Corpus Christi	TX	Director of Intergovernmental Relations	323,733
Delaware County	PA	Chief Personnel Officer	564,751
Durango	CO	City Attorney	19,071
El Paso	TX	Deputy City Attorney	678,815
El Paso	TX	Director of the Museum of Art	678,815
El Paso	TX	Health Director	678,815
Elgin	IL	Communications & Engagement Director	114,797
Gainesville Regional Utilities	FL	Energy Delivery Officer	141,085
Goshen	IN	Utilities City Engineer	34,520
Grand Rapids	MI	Human Resources Director	202,181
Greenbelt	MD	City Manager	24,921
Greene County	VA	County Administrator	19,779
Hastings	NE	Chamber/HEDC Director	25,152
Hastings	NE	Director of Development Services	25,152
Highland Park	TX	Town Administrator	8,993
Huber Heights	OH	City Manager	43,439
Kansas City	MO	Chief Technology Officer	500,000
League of Minnesota Cities	MN	Executive Director	
Loudoun County	VA	Deputy Director of Human Resources	406,850
Maryland-National Capital Park & Planning Commission	MD	Planning Director	
Matthews	NC	Police Chief	29,435
Midland	TX	City Manager	132,520
Minneapolis	MN	City Operations Officer	429,954
Minneapolis	MN	Neighborhood Safety Director	429,954
Montgomery County	MD	Director of Department of Corrections & Rehab	1,006,000
Nebraska Department of Health & Human Services	NE	Behavioral Health Director	
Nebraska Department of Health & Human Services	NE	Children & Family Services Director	
Oakland	CA	Principal Budget & Management Analyst	440,646
Ottawa Hills	OH	Finance Director	4,814
Perrysburg	OH	City Administrator	21,730
Portland	ME	City Manager	66,595
Portland	ME	Housing & Economic Development Director	66,595
Rockville	MD	Human Resources Director	67,117
SouthWest Transit	MN	Chief Executive Officer	
Spartanburg	SC	Assistant City Manager	38,732

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

LIST OF CURRENT PROJECTS			
Client	State	Project	Population
Stafford County	VA	Director of Planning & Zoning	136,788
Union City	CA	Human Resources Director	74,107
Warrenton	VA	Town Manager	10,057
Williamsburg Area Transit Authority	VA	Executive Director	

b. Approach to be used to address each search activity.

Understanding your needs to help achieve your objectives and mission

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

Baker Tilly public sector executive recruiters will collaborate with you or your designated staff to understand the traits, attributes, capabilities and overall qualifications that are most important to your organization for this recruitment. The information we gather helps us customize colorful and informative marketing, recruitment and outreach strategies, and materials that present the Village of Elm Grove as a great municipal organization that is and remains a high-quality community that exceeds the expectations of its residents and visitors.

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

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

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

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

The Baker Tilly executive recruitment process

Task 1: Kickoff, marketing, recruitment and outreach

Developing a comprehensive recruitment brochure that includes a profile of the ideal candidate is an essential first step in your recruitment process. This profile includes the required academic training, professional experience, leadership, management and personal characteristics related to the candidate's success in the position of Village Manager. The recruitment brochure will also include a profile that captures the essence of the Village of Elm Grove as a highly attractive venue for the successful candidate to live and work.

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

To prepare the recruitment brochure, the engagement team leader will meet with the Village Board, Village staff and other designated stakeholders to discuss the required background, professional experience, and management and leadership characteristics for your Village Manager. We meet individually (or collectively, depending upon your preference) with members of the Village Board to broaden our understanding of the position's leadership and management requirements, current issues, your strategic priorities and expectations for the Village Manager.

Information from these meetings and our review of the job description and other Village documents is used to prepare a position and candidate profile. The Village will approve the completed profile before recruitment begins. The position and candidate profile will be central to our recruitment strategy and outreach to potential candidates. [See example of a recruitment brochure in **Appendix C.**]

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

If required, our team will place ads in relevant professional publications, websites and local print media and coordinate with Village staff to include information about the search on the Village's social media platforms. Baker Tilly also has a high-traffic website with an exclusive location dedicated to encouraging potential candidates to upload their resumes. The aggressive advertising and marketing campaign for top talent will consist of national, state, regional and local elements determined during our initial meetings with the Village's representatives. Our customized mailing list, selected from our extensive database and contacts collected at appropriate public-sector conferences, will be utilized to promote the Village Manager position further.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Position profile and recruitment brochure development	<ul style="list-style-type: none"> Baker Tilly meets with the Village to receive information regarding the Village's budgets, organizational charts, images, logos, etc. Develop draft documents (recruitment brochure, advertisement, marketing letter and timeline) 	2 weeks
Approve brochure, begin advertising and distribute marketing letter	<ul style="list-style-type: none"> Brochure sent to Village for final approval Begin advertising and distribution of recruitment brochure 	2 weeks

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

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

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

These efforts will be supplemented by creating a customized database utilizing our extensive, interactive applicant database for the Village Manager position. This will allow the Baker Tilly team to customize applicant flow and tracking, communicate with applicants and conduct database inquiries for candidates based on characteristics important to the Village, such as geographic location, particular experience, expertise and credentials.

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

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

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Execution of recruitment strategy and candidate outreach	<ul style="list-style-type: none">• Online data collection and profile development• Development of an interactive, searchable applicant database for recruitment of your Village Manager• Baker Tilly performs direct outreach to prospective candidates identified in the recruitment strategy• Utilization of an extensive applicant database to identify applications and review the applicant pool for competencies/demographics	4-5 weeks

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

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

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

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

You will have access to our Applicant List, which will provide pertinent data for each applicant.

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Applicant screening and recommendation of semi-finalists	<ul style="list-style-type: none"> • Baker Tilly compares applications to the approved candidate profile developed in our searchable applicant database • Most promising applicants are asked to complete candidate questionnaires and provide due diligence information • Media, internet and social media scan for information pertinent to future employment • Top candidates identified as semi-finalists • Semi-Finalist Report is prepared, including the brochure, applicant list, cover letter and resume of candidates to be considered • Baker Tilly and the Village Board review video interviews • Project team leader meets with the Village Board to review recommended semi-finalists • Village Board selects finalists for on-site interviews • Finalists complete candidate management style assessment, responses are reviewed, and interview questions are developed 	2-3 weeks

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

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

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

REFERENCE CHECKS, BACKGROUND RECORDS CHECKS AND ACADEMIC VERIFICATIONS
Elm Grove will receive a report that thoroughly verifies each finalist’s background.

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

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

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Design final process with the Village for on-site interviews with finalists	<ul style="list-style-type: none"> Baker Tilly confirms interviews with candidates 	1-2 days
Background checks, reference checks and academic verifications	<ul style="list-style-type: none"> Baker Tilly completes background records checks, reference checks and academic verifications of finalists 	2-3 weeks

Task 5: Final interview process

Upon completing Task 4, we will work with your Village Board and designated staff to develop the final interview process. We customize the process according to your needs, desired outcomes, position functions, preferences and directives. This may include steps that are important to you, our client. As such, the final interview process may consist of meetings with the department heads and the opportunity for a meet and greet with community members and individual tours of the Village. We work with your organization to adjust all aspects of our process as you deem necessary and appropriate.

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

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

PROJECT MILESTONE	DELIVERABLES	TIMELINE
Final Report prepared and delivered to the Village	<ul style="list-style-type: none"> Final Report is prepared, including brochure, schedule, cover letter, resume, candidate questionnaire, suggested interview questions, candidate assessment form and management style probing questions 	1 day
On-site interviews with finalists	<ul style="list-style-type: none"> Interviews are scheduled Recruitment project team leader attends client interviews and is available to participate during deliberations of candidates if requested 	1-2 days
Offer made/accepted	<ul style="list-style-type: none"> If requested, Baker Tilly participates in candidate employment agreement negotiations Baker Tilly notifies candidates of the decision Baker Tilly confirms the final process; close out items with the Village of Elm Grove 	1-2 days

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

Providing optional post-placement activities

A successful executive search creates an opportunity to solidify the leadership bond between Elm Grove's elected officials and the new Village Manager. To encourage growth and positive change, we offer the following fee-based supplementary services.

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

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

Our strategy for the recruitment of diverse candidates

Our corporate core values and work environment reflect our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. We have established solid and credible networks with minority and female leaders nationwide. In addition, we are corporate members of the National Forum for Black Public Administrators (NFBPA) and the Local Government Hispanic Network and are on NFBPA's National Corporate Advisory Council. We participate in their membership events on a regular basis.

To that end, we take responsibility for diversity in our organization, recruitment strategy, and candidate pools. In every recruitment, we use our established networks to make direct and personal contacts with prospective minority and female candidates and will encourage them to consider Elm Grove's Village Manager opportunity. Because of our performance record in presenting a diverse applicant pool, these prospective candidates know that the Baker Tilly executive recruitment team will fairly consider each application based on qualifications and the established profile.

Why Baker Tilly is ideally suited to serve Elm Grove

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

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

WHAT WE UNDERSTAND THE VILLAGE NEEDS	HOW WE WILL DELIVER
Carefully structured process supported by technology	<ul style="list-style-type: none"> • Comprehensive and seamless process refined by years of interaction with local government, not-for-profit employers, and prospective candidates. • Leverage the search process with technology tools, including a video interview system, management/leadership style assessment analysis and online application platform. • Efficient management of candidate information and providing the Village Board with unique information about each candidate's leadership and management style and ability to respond extemporaneously to video questions.
Public sector recruiting specialization and experience	<ul style="list-style-type: none"> • Experienced executive recruitment professionals passionate about local government since all have spent a significant part of their professional careers in senior leadership positions for cities, counties and school districts. • Successful recruitment of more than 1,675 executive-level positions within cities, counties, school districts and public and not-for-profit organizations since 2000.
Thorough candidate evaluation	<ul style="list-style-type: none"> • Active recruitment of qualified candidates, drawing from our extensive personal and professional connections with capable individuals, assuring the Village of its access to established managers and rising stars. • Thorough evaluation of the final candidates, including detailed information from references and a careful review of background records to ensure sound professional and personal character.
Diversity in executive recruitment	<ul style="list-style-type: none"> • Committed to diversity in executive recruitment as a reflection of our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. • Ensure diversity is a focus of our recruitment strategy and candidate pools through involvement with the National Forum for Black Public Administrators (NFBPA) and their Corporate Advisory Council, the Local Government Hispanic Network and other organizations.
Delivering value on the Village's budget	<ul style="list-style-type: none"> • Full-service engagement includes advertising, preparation of a recruitment brochure, background, reference and academic verification checks and up to three on-site visits. • Work closely to meet the Village's needs and any unexpected circumstances that may arise during your recruitment to expedite the recruitment, but not at the expense of finding high-quality candidates.
Triple Guarantee	<ul style="list-style-type: none"> • Focus on assisting with your executive recruitment until you make an appointment. • Guarantee your executive recruitment for 12 months against termination or resignation for any reason — or we will come back to fill your Village Manager position for no additional professional fee. • Commitment not to directly solicit any candidates selected under this contract for another position while employed with your organization.
Transparency and confidentiality	<ul style="list-style-type: none"> • No preconceived notions or expectations about the Village and prospective candidates.

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

WHAT WE UNDERSTAND THE VILLAGE NEEDS	HOW WE WILL DELIVER
	<ul style="list-style-type: none"> • Work closely with the Village to make sure the process is transparent. • Ensure applications are kept confidential, where permitted by state and local laws, to ensure candidates can express interest without jeopardizing current employment to maximize the number of qualified applicants.
<p>Keeping the Village involved and minimizing disruption</p>	<ul style="list-style-type: none"> • Comprehensive process incorporates the active participation of the Village Board at key steps in the process. • Keep decision-makers fully advised and informed of all aspects of the process without requiring them to expend substantial time or put aside other pressing issues. • Village staff can stay focused on their primary and assigned functions while Baker Tilly manages the search process.

BAKER TILLY DIFFERENTIATES ITSELF FROM OTHER EXECUTIVE RECRUITMENT FIRMS
Elm Grove will benefit from our understanding of best practices within the executive recruitment space.

c. Methods used to communicate and to work with the Village Board and its designated representatives.

Methods to communicate and work with staff

One of our most essential tools is communication with our clients, internal and external customers. As such, once a client designates a lead project manager, we establish a communication protocol that may include weekly or bi-weekly touchpoints and updates, including a review of the search timeline. Depending on the need or desire of the client, we can provide weekly updates, to include the number of individuals who apply for a position, the locations or sites we post an announcement and any other information that we may have available, regarding the applicant pool.

Expectations and/or deliverables required of staff

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

The Village would be responsible for organizing the on-site interview process, but always with best practice suggestions provided by the recruitment project team leader, if requested. As identified in section 4. Cost proposal, the Village would be responsible for all travel related expenses incurred by candidates for on-site interviews and would not be the responsibility of Baker Tilly. This recruitment process is considered a turn-key process to identify qualified and outstanding Village Manager candidates for the aaa of nnn. Any other responsibilities relating to both Baker Tilly and the Village, such as submittal of invoices, payment terms and all other anticipated interactions, are detailed in various sections of this proposal.

3. APPROACH/STRATEGY USED TO PERFORM PROJECT

d. Describe major challenges to a successful Village Manager search and how the project team will address them.

Finding solutions to challenges

We recognize that there is significant competition for experienced municipal managers today. For this reason, we work with you to develop a recruitment strategy that includes an aggressive marketing, recruiting and candidate outreach campaign. As you know, successful recruitments often depend upon the ability to reach successful municipal managers who may not necessarily be in search of new employment opportunities. Thus, we use existing resources to inform and encourage qualified professionals to apply for opportunities with your organization. We believe that these efforts are critical to ensuring that the Village receives a qualified candidate pool.

Our public sector executive recruitment engagement team members are seasoned and include very experienced former city, county and school district executives who work effectively to ensure the overall efficiency and target result of each search. As such, the designated engagement leader has the technical expertise and invaluable support of a stellar team of professionals who specialize in the public sector recruitment space and whose commitment to the success of each search is unmatched. In the event of a “challenge” we will work with the Village to clearly identify viable solutions or alternatives, then, if necessary, consult with our team of in-house specialists, to identify the most effective solution. The same is true for changes to project scope or timelines.

4. Cost proposal

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

a. The total not-to-exceed cost, as well as an itemized breakdown of the cost associated with major or important components of the search, as determined by the consultant.

Delivering a professional fee estimate for the Village of Elm Grove

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

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

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

Feel free to direct all questions regarding the professional fee and project-related expenses to Patty Heminover via email at patty.heminover@bakertilly.com or via phone at +1 (651) 223 3058.

PROPOSED SERVICES	FEES
Phase I	
Task 1 — Candidate profile development/advertising/marketing	\$6,190
Task 2 — Identify quality candidates	\$4,390
Phase II	
Task 3 — Screening of applications and submission of recommended semi-finalists to the client	\$6,280
Task 4 — Reference checks, background checks and academic verifications	\$3,500
Phase III	
Task 5 — Final process/on-site interviews with finalists	\$6,590
Conclusion	
Assistance and technical support for total rewards (salary and benefits), employment offer negotiation, offer and acceptance by finalist	
TOTAL ALL-INCLUSIVE FEE*	\$26,950

** BAKER TILLY MAY CONSIDER A PROFESSIONAL FEE REDUCTION OF 10% if the Village of Elm Grove is provided additional recruitments during the subsequent 12-month period.*

b. Clearly define, identify, and provide an estimate of additional services and/or reimbursable expenses not included in the basic fee.

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

BAKER TILLY CAN PROVIDE OPTIONAL SERVICES

The Village of Elm Grove may benefit from the additional services we offer. No additional services will be billed without the express consent and agreement with the Village.

Negotiations

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

Supporting Elm Grove with our value-for-fees approach

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

 <p>A team that works with a similar client base and is ready to lead a smooth and beneficial transition</p>	 <p>Frequent check-ins and timely responses to your inquiries</p>	 <p>Controlled costs through a service approach designed for your organization; no surprise billing or add-on charges</p>	 <p>Knowledge retention through a commitment to staff continuity</p>	 <p>Proactive ideas and industry insight shared year-round via complimentary articles, toolkits, webinars, e-books, alerts, whitepapers and newsletters</p>
 <p>Support from the full breadth and depth of Baker Tilly's resources across the U.S. and around the world</p>	 <p>Practical, flexible and collaborative approach designed for your unique needs</p>	 <p>Full range of service solutions to grow with your needs</p>	 <p>Use of innovative technology and software tools to support real-time communication, efficiencies and compliance</p>	 <p>High level of experienced partner and manager involvement for a big-picture perspective</p>

COMMITMENT TO VALUE FOR FEES

Elm Grove can expect exceptional service paired with a fair, competitive fee arrangement that allows us to deliver continuous value throughout our relationship.

5. Additional material

a. Alternate proposals identifying areas to reduce ultimate Village cost are encouraged.

Two alternatives are available to assist the Village of Elm Grove in holding down costs. First, the Village could decide to forgo video interviews of the candidates. Video interviews provide additional information to assist local governments to determine the candidates they want to invite to on-site interviews. The video interviews can be dropped for a savings of \$750. Second, in lieu of an on-site meeting to select final candidates, Baker Tilly could meet with the Search Committee via Microsoft Teams, our web conferencing software, to host remote meetings for a savings of \$1,500.

b. Sample work products such as recruitment brochures, candidate questionnaire, candidate reference, and background reports.

Sample work products are provided in **Appendix C**.

c. Philosophy and policies regarding client satisfaction in the event of an unsuccessful search or premature (within two years of appointment) dismissal or resignation of identified candidates. State any guarantees offered.

Triple Guarantee

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

While we believe in the overall success of our process, we also recognize that unusual circumstances will invariably emerge. This is why we offer a trifold, industry-leading triple guarantee.

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

d. A sample of any standard contract form normally used by the consultant.

Sample contract

Date

Name

Address

Address

Dear Salutation:

This letter agreement (the “Agreement”) documents the ENTITY (“you/r” or “Client”) engagement of Baker Tilly US, LLP (“we” or “Baker Tilly”) to conduct an executive search for TITLE (the “Project”). This Agreement defines our and your respective obligations for the Project.

Scope, Objectives and Approach

A team approach, which uses a combination of your personnel and ours, is critical to the success of the Project. Your organization and its team members bring the knowledge of your particular needs and we bring a deep understanding of public sector executive recruitment and selection practices.

PHASE	DESCRIPTION OF BAKER TILLY’S PROFESSIONAL SERVICES
Phase I	<p><u>Task 1</u> – Develop the candidate profile and define the advertising and marketing strategy.</p> <p><u>Task 2</u> – Identify qualified candidates that meet the profile.</p>
Phase II	<p><u>Task 3</u> – Screen and submit list of recommended semi-finalists to client.</p> <p><u>Task 4</u> – Conduct reference checks, and academic verifications. A criminal and/or credit history report may also be conducted at this Phase or at the conclusion of Phase III, as specified by you.</p>
Phase III	<p><u>Task 5</u> – Final process/interviews with finalists.</p> <p><u>Task 6</u> – Assist Client in making offer, which may be made contingent upon the successful completion of a background check as specified by you.</p>
Conclusion	Acceptance of offer by candidate.

Project Timing and Budget

The Project will commence upon your execution of this Agreement and will remain in effect for the period necessary for successful completion of the Project.

1. CONSULTANT will lead the Project, and other professionals will be involved as required. The all-inclusive professional fee to complete the Project is \$26,950 (the “Fee”) and includes the cost of professional services by the Project Team Leader and the project support staff, and all project-related expenses such as advertising, printing, candidate background and reference checks, and travel expenses for on-site visits by the Project Team Leader. Travel expenses incurred by candidates for on-site interviews with the Client are not the responsibility of Baker Tilly and shall be handled directly by the Client. The Client will make payments upon receipt of an invoice submitted by Baker Tilly. Payment to Baker Tilly is due upon receipt. All invoices will be forwarded to the Client for processing unless otherwise directed. For reporting purposes, Baker Tilly’s tax identification number is 39-0859910.
2. The Fee will be billed in four installments; 30% of the Fee will be billed upon execution of this Letter; 30% at the implementation of Phase I; 30% at the implementation of Phase II; and the final 10% upon acceptance of offer by the candidate. The Fee is not contingent. If you terminate this engagement before completion, Baker Tilly shall invoice you for any unpaid portion of the Fee.

3. If Client requests Baker Tilly to perform additional services beyond the services described above, such as conducting an employee/community survey or making additional on-site visits, such additional services shall result in additional fees. For an employee/community survey, the additional fee shall be **\$1,650**. For additional on-site visits (beyond the three on-site visits which include four consulting days), the additional fee would be an hourly rate of \$300 plus expenses.

Baker Tilly's Guarantees

1. Baker Tilly shall remain on the Project until you find a candidate to hire. If you are unable to make a selection from the initial group of semifinalists or finalists, Baker Tilly will work to identify additional candidates for your selection.
2. We promise that if the candidate you select is terminated or resigns within 12 months from being hired, Baker Tilly will conduct an additional search for you for no additional professional fee, but only for project-related expenses. Internal candidates selected from within your organization do not qualify for this guarantee. Except as stated above, Baker Tilly cannot guarantee the success of any candidate or guarantee that he or she shall perform to your expectations, as those things are beyond Baker Tilly's control.
3. Baker Tilly will not solicit the candidate you select for any other position while the candidate is employed by your organization.
4. When Baker Tilly obtains a criminal or credit history report on the candidates, Baker Tilly shall comply with the Fair Credit Reporting Act (the "FCRA") in obtaining the reports. Baker Tilly cannot guarantee the completeness or accuracy of the information in the reports.
5. In identifying and screening candidates, Baker Tilly will not discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status or any other basis that is prohibited by federal, state or local law. Proactively, we shall make a good faith effort to include a diverse pool of qualified candidates in our search assignments.

Client's Obligations

1. You agree that you are responsible for candidate selections and that you will not discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status or any other basis that is prohibited by federal, state or local law.
2. If you decide to not hire a candidate as a result of a criminal or credit history report, you agree to comply with the FCRA with regard to any pre- or post-adverse action notices and requirements.
3. You agree to respond to drafts of documents and reports in a timely manner. Failure to do so on your part will protract timelines and can negatively influence the outcome of the process.

Management's Responsibilities

It is understood that Baker Tilly will serve in an advisory capacity with Client. The Client is responsible for management decisions and functions, and for designating an individual with suitable skill, knowledge or experience to oversee the services we provide. The Client is responsible for evaluating the adequacy and results of the services performed and accepting responsibility for such services. The Client is responsible for establishing and maintaining internal controls, including monitoring ongoing activities.

The procedures we perform in our engagement will be heavily influenced by the representations that we receive from Client personnel. Accordingly, false representations could cause material errors to go undetected. The Client, therefore, agrees that Baker Tilly will have no liability in connection with claims based upon a failure to detect material errors resulting from false representations made to us by any Client personnel and our failure to provide an acceptable level of service due to those false

representations.

The ability to provide services according to timelines established and at fees indicated will rely in part on receiving timely responses from the Client. The Client will provide information and responses to deliverables within the timeframes established in this Agreement unless subsequently agreed otherwise in writing.

The responsibility for auditing the records of Client rests with the Client's separately retained auditor and the work performed by Baker Tilly shall not include an audit or review of the records or the expression of an opinion on financial data.

Terms and Conditions

1. To the extent allowed under applicable law, the aggregate liability (including attorney's fees and all other costs) of either party and its present or former partners, principals, agents or employees to the other party related to the services performed under this Agreement shall not exceed the fees paid to Baker Tilly under the portion of this Agreement to which the claim relates, except to the extent finally determined to have resulted from the gross negligence, willful misconduct or fraudulent behavior of the at-fault party. Additionally, in no event shall either party be liable for any lost profits, lost business opportunity, lost data, consequential, special, incidental, exemplary or punitive damages, delays or interruptions arising out of or related to this Agreement even if the other party has been advised of the possibility of such damages.
2. Each party recognizes and agrees that the warranty disclaimers and liability and remedy limitations in this Agreement are material bargained for bases of this Agreement and that they have been taken into account and reflected in determining the consideration to be given by each party under this Agreement and in the decision by each party to enter into this Agreement.
3. Neither this Agreement nor any rights or obligations hereunder shall be assigned or delegated by Baker Tilly without your prior written consent. This Agreement shall be modified only by a written agreement duly executed by you and Baker Tilly. Should any of the provisions hereunder be found to be invalid, void, or voidable by a court, the remaining provisions shall remain in full force and effect.
4. Copies of all hard copy documents associated with the recruitment will be retained for three (3) years from the anniversary date of the hiring of the candidate. Retention of records beyond three (3) years must be requested in writing before the conclusion of the Project.
5. Baker Tilly US, LLP is an independent member of Baker Tilly International. Baker Tilly International Limited is an English company. Baker Tilly International provides no professional services to clients. Each member firm is a separate and independent legal entity and each describes itself as such. Baker Tilly US, LLP is not Baker Tilly International's agent and does not have the authority to bind Baker Tilly International or act on Baker Tilly International's behalf. None of Baker Tilly International, Baker Tilly US, LLP, nor any of the other member firms of Baker Tilly International has any liability for each other's acts or omissions. The name Baker Tilly and its associated logo is used under license from Baker Tilly International Limited.

If this Agreement correctly sets for your understanding, please sign below and return one copy to us for our files. We look forward to working with you on this important project.

[Signature page follows]

Sincerely,

Anne Lewis, Practice Leader | Director

Client Signature:

Name: _____

Title: _____

Date: _____

Appendix A: Prioritizing Diversity, Inclusion and Belonging for Success (DIBS)

At Baker Tilly, DIBS is who we are rather than what we do. Creating an environment where all team members are valued empowers us to bring our authentic selves to work each day. When our contributions reflect our individual best, we achieve better results for Elm Grove.

Prioritizing Diversity, Inclusion and Belonging for Success (DIBS)

Belonging is a core Baker Tilly value. We foster a deep level of mutual respect where each one of us feels seen, heard, valued and connected. Each team member commits to upholding a diverse and inclusive workplace driven by fairness, compassion and equality.



**MEET SHANE LLOYD,
DIBS STRATEGY LEADER**
*In his role as Head of
Diversity, Inclusion and
Belonging at Baker Tilly,
Shane oversees our
company's DIBS initiatives
and serves on influential
national diversity and
inclusion boards.*

Throughout our firm, you will find our DIBS philosophy and practices embedded into everything we do. We hire people who bring new perspectives and experiences, including Shane Lloyd, who joined Baker Tilly as our [DIBS strategy](#) leader in 2021. Shane was named to the Washington Business Journal's 2022 "40 under 40," a prestigious list that recognizes individuals with impressive careers who demonstrate a strong commitment to philanthropy and community building.

Shane was also selected as Program Chair to The Conference Board's Diversity, Equity and Inclusion (DEI) Strategists Council I, where he will strategize on key topics and trends to educate and connect other senior DEI leaders in the corporate space. Read more about the council [here](#).

We embrace our differences and believe a more open, connected world serves everyone better. DIBS is the lens that helps us see things more broadly and lights the path for us to follow. This benefits our people, our clients and our communities. [Watch this video](#) to learn more about the ways Baker Tilly celebrates diversity, inclusion and belonging and values the contributions of every team member across our firm.

DIBS steering committee

Baker Tilly's national DIBS steering committee is designed to strengthen our firm's culture of diversity, inclusion and belonging.

A cross-section of leaders across our firm oversees our strategy – from inclusion-related communications to accountability measures for our key diversity goals and coordination of our signature initiatives described below and on the following pages.



**WE EMBED DIBS INTO ALL
ASPECTS OF OUR BUSINESS**
*From how we recruit, develop and
promote team members, to the
way we serve clients and treat
each other. Day in, day out.*



Growth and Retention of Women (GROW)



Through our GROW initiative, Baker Tilly provides women valuable opportunities to network, share their stories, acquire skills, strengthen professional relationships and advance in their careers. Our commitment to GROW increases the number of women in management positions, enhances the retention of women at all firm levels, creates an environment where women feel empowered and supports our advocacy of advancing women in business. It also helps us share knowledge gained with clients and creates a workforce that reflects our client base.

Supporting Opportunity, Advancement and Recognition (SOAR)



SOAR focuses on improving inclusion and increasing retention of team members of color to create a more inclusive, innovative and productive workforce. Diversity makes each of our professionals unique; inclusion is how that unique team collaborates to achieve common goals. Our SOAR strategy rests on four key pillars: talent acquisition, advancement, education and awareness, and recognition.

NexGen: joining workforce generations



Today, four generations coexist in the workplace – baby boomers, Gen X, millennials and Gen Z – and each brings unique viewpoints influenced by events and experiences in their lifetime. With NexGen, we aim to empower the next generation of team members to collaboratively engage in our firm's progress while promoting an overall investment in our future. Key components of NexGen's vision involve discovering how different generations can build rewarding professional relationships that are mutually beneficial. NexGen amplifies the voices of our firm's next generation of professionals, providing leadership and growth opportunities along the way.

PRIDE team member network



Our PRIDE team member network exists to support the LGBTQ+ community and their allies within Baker Tilly. We strive to create an open environment centered on LGBTQ+ issues and topics relevant to the workplace. This effort includes involvement, support, understanding and acceptance from colleagues across our firm.

Racial Equity Action Plan (ACTION) and focus on social justice



Our firm developed an ACTION plan to support our strategic goal of increasing the retention of team members of color and to create positive change in our communities and our profession. As initial steps in our plan, we convened our DIBS steering committee and formed a racial equity advisory group consisting of a diverse group of team members. We then worked closely with a highly respected consulting firm to assess the current state of our workplace as it relates to diversity, inclusion and racial equity. We used their recommendations to refine our DIBS strategic plan and inform the next steps in our journey.

Baker Tilly team members continue to take the time to have difficult conversations and reflect deeply. Colleagues shared stories of how racism and discrimination affect their daily lives – stories they did not feel comfortable sharing before. Others gained new insight into their own unconscious biases and the steps needed to overcome them. We are committed to continuing on this learning journey and achieving tangible results together.

Baker Tilly Foundation support for racial justice advocacy



As a firm, we have made our position clear: We stand against racism and discrimination in any form. Our Baker Tilly Foundation's board of directors, with input from our team members, selected key racial justice organizations as recipients of direct financial support from our firm with a commitment to match team member donations. Additionally, our local SOAR committees support social justice causes across the United States through event sponsorship, fundraising initiatives and volunteer engagement.

Baker Tilly backs Human Rights Campaign initiatives and national associations for accountants of color

In May 2022, Baker Tilly signed on to the Human Rights Campaign's [Business Statement Opposing Anti-LGBTQ State Legislation and Business Coalition for Equality Act](#), taking a stand against legislation that would attempt to exclude LGBTQ+ people from full participation in daily life and promoting workplace equality.

Baker Tilly is also expanding our connections and alignment with key professional organizations. We are a Platinum Sponsor of the 2022 National Association of Black Accountants (NABA) National Convention and a participant in conferences for the Ascend Pan-Asian professional network and the Association of Latino Professionals in Finance and Accounting (ALPFA).

Tone from the top: CEO Action for Diversity & Inclusion

CEO **ACT!ON** FOR DIVERSITY & INCLUSION

Baker Tilly is a member of [CEO Action for Diversity & Inclusion](#), a steering committee of CEOs focused on making diversity and inclusion a business priority. CEO Action for Diversity & Inclusion is the most extensive alliance of business leaders openly committed to sharing successful diversity initiatives and lessons learned. **As a member, Baker Tilly pledges to:**

- Make our workplace a safe place to have open conversations about diversity and inclusion
- Implement and expand unconscious bias education
- Share best, and unsuccessful, practices
- Create and share strategic inclusion and diversity plans with our board of partners



BAKER TILLY RECOGNIZED WITH PERFECT SCORE ON CORPORATE EQUALITY INDEX

The Human Rights Campaign awarded Baker Tilly 100 points out of 100 on the 2022 Corporate Equality Index (CEI), an industry-standard measure created to evaluate corporate policies, practices and benefits that support LGBTQ+ team members.

As evidence of our commitment to DIBS, examples of public recognition received in recent years are listed below.

PUBLIC RECOGNITION AND AWARDS FROM INDEPENDENT PUBLICATIONS FOR OUR DIBS EFFORTS

Named to the [Forbes Best Employers for Diversity 2022](#) list

Winner of the 2022 [Human Rights Campaign Foundation's Best Places to Work](#)

Ranked #7 in the [2023 Vault Accounting 25](#), receiving special recognition for improving our diversity scores in every area, including categories for women, racial/ethnic diversity, LGBTQ+ and overall diversity ranking

[Business Wire](#) and [Inside Public Accounting](#) articles on Shane Lloyd's appointment as Baker Tilly's Head of Diversity, Inclusion and Belonging

[Podcast with Shane Lloyd](#) on diversity

Host of 2020 "[Diversity Well Beyond the Theory: The 'how' in recruitment, retention and inclusion](#)" event in Tysons, Virginia

Recognition as 2018 [Corporate Partner of the Year](#) by the National Association of Black Accountants (NABA) Metropolitan Washington, D.C. Chapter

Winner of Corp! Magazine's "[Salute to Diversity](#)" Award

Journal of Accountancy article featuring Baker Tilly's diversity initiatives: "[The business case for diversity and inclusion at CPA firms](#)"

Pennsylvania Institute of Certified Public Accountants (PICPA) article by a Baker Tilly team member discussing her experience with diversity at our firm: "[CPA Now - My Experience with a Diversity Initiative](#)"

Twin Cities Business article highlighting Baker Tilly's commitment to our GROW initiative: "[All In: Hiring Women Executives](#)"

Appendix B: Engagement team member resumes

DIRECTOR

Patricia Heminover

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



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Suite 3025
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United States

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patty.heminover@bakertilly.com

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Education

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

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

Master of Education, administration
Minnesota State University – Mankato

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

Specific experience

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

Industry involvement

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

Continuing professional education

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

DIRECTOR

Art Davis

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



Baker Tilly US, LLP

5440 W 110th St
Suite 300
Overland Park, KS 66211
United States

T: +1 (816) 912 2036
art.davis@bakertilly.com

bakertilly.com

Education

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

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

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

Specific experience

- Successfully launched and expanded his own local government consulting firm over the course of 10 years
- More than 15 years of experience in executive recruitment
- Community leadership program facilitation
- Leadership and management development
- Strategic goal setting and strategic planning facilitation
- Organizational assessment, design and development
- Organization and community facilitation
- Served more than six years as associate director for the Civic Council of Greater Kansas City, a nonprofit, 501c4 membership organization comprised of CEOs representing some of the largest companies in the region
- Coordinated and organized a strategic and master planning process (and an update of the plan after four years) focused on re-developing downtown Kansas City, involving hundreds of stakeholders
- Served nearly six years as city administrator for Lee's Summit, Missouri and in other local government positions in Kansas
- Served as assistant to the Mayor of Dallas, Texas
- Led and participated in a wide variety of community initiatives; served on a major hospital board for 13 years and on other not-for-profit boards
- Presented with the L.P. Cookingham Award by the Greater Kansas City Chapter of the American Society for Public Administration, recognizing his long-term and outstanding contributions in the field of public administration

Industry involvement

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

MANAGING DIRECTOR

Nancy Hetrick

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



Baker Tilly US, LLP

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28th Floor
Chicago, IL 60601
United States

T: +1 (408) 437 5400
nancy.hetrick@bakertilly.com

bakertilly.com

Education

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

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

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

Since 2006, she has led projects with local governments, including the Bay Area cities of Rohnert Park, Redwood City, San Carlos, Fairfax, Orinda, Merced, Martinez, San Jose and Santa Cruz; the Sacramento Area Council of Governments; the Peninsula Library Partnership; and the Bay Area Counties of Alameda, San Mateo, Marin, Monterey and Santa Clara.

Specific experience

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

Industry involvement

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

DIRECTOR

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

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



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yolanda.howze@bakertilly.com

bakertilly.com

Education

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

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

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

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

Specific experience

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

Industry involvement

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

Continuing professional education

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

MANAGING DIRECTOR

Anne Lewis

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



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Education

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

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

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

Industry involvement

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

Community involvement

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

Continuing professional education

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

DIRECTOR

Edward G. Williams, Ph.D.

Edward Williams brings character, competence and expertise to every project.



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Education

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

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

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

Languages

English
Spanish

Edward has more than 20 years of collective experience in human resources and organizational development at various levels and across multiple disciplines, including state and local government, community and educational institutions.

Specific experience

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

Industry involvement

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

Community involvement

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

Continuing professional education

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

RECRUITMENT ANALYST

Karen Edwards, SHRM-CP

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



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Education

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

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

Specific experience

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

MANAGER

Michelle Lopez

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



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Education

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

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

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

Specific experience

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

RECRUITMENT ANALYST

Diane Segulia

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



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Education

University of Minnesota – partial credits (Minneapolis, Minnesota)

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

Specific experience

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

RECRUITMENT ANALYST

Carrie Thompson

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



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Education

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

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

Specific experience

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

Community involvement

- Mission trip volunteer with Herndon United Methodist Church

Appendix C: Sample materials



PRESENTED TO
SAMPLE CITY, USA

FINALIST REPORT
CITY ADMINISTRATOR

DATE



THE INFORMATION CONTAINED WITHIN
IS PRIVATE DATA AND IS NOT INTENDED
FOR PUBLIC DISTRIBUTION

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- CANDIDATE 3 – NAME
- CANDIDATE 4 – NAME
- CANDIDATE 5 – NAME



RECRUITMENT BROCHURE



INTERVIEW SCHEDULE



INTERVIEW GUIDE

Interview Guide

Introduction

The structured interview can be the best tool for evaluating candidates, particularly in today's litigious society. This section has been prepared to assist interviewers by providing guidance and suggestions for interviewing candidates.

Legal Issues

In preparing for the discussion with the candidate, it is important to remember the interview is a very critical part of the employment process and is covered by anti-discrimination laws.

Summary of Protected Classes

The purpose of state and federal laws regarding discrimination in employment is to ensure hiring decisions are based upon the applicant's ability to perform the job, not on arbitrary factors unrelated to job performance. In general, it is unlawful to base a decision to hire or not hire an applicant on any of the following criteria: race, color, creed, religion, national origin, gender, marital status, familial status, disability, public assistance, age, sexual orientation, or local Human Rights Commission activity.

Questions based upon any of these elements may open an employer to potentially costly claims for discrimination. It is illegal to base a decision on one of these criteria, even if the information is obtained outside of the interview process, or inadvertently during the interview.

The development of specific interview questions not only assures all important aspects of the job are covered during the interview, it helps to ensure that interviewers avoid potentially dangerous subjects.

Illegal Interview Questions to Avoid

Various federal and state laws regulate questions that the employer can ask a candidate. Interview questions must be related to the job the candidate has applied for. The interviewer's focus must be: "What do I need to know to decide whether or not this person can perform the functions of the job?"

Examples of illegal questions are listed on the following page. This is not, by any means, a complete list, but can serve as a guide for types of questions to avoid.

Interview Guide

1. National Origin/Citizenship

- Avoid questions about where the applicant or the applicant's parents were born.
- Avoid inquiries about an applicant's name such as asking the derivation of one's last name.

2. Age

- Avoid questions about age/date of birth.
- Do not ask a candidate when he or she graduated from high school/college.
- Avoid asking about dates of military service.

3. Gender

- Avoid asking questions related to an applicant's gender or gender identity.

4. Race/Color

- Avoid questions regarding an applicant's race.
- Avoid questions or comments regarding color of hair, eyes, skin, etc.

5. Marital/Family Status

- Avoid questions about marital status. Do not ask applicants if they are single, married, or divorced.
- Avoid asking whether an applicant's spouse is employed or about the occupation of the applicant's spouse.
- Do not ask if the applicant has any children.

6. Sexual Orientation

- Avoid all questions related to sexual orientation or sexual identity.

7. Salary History

- Avoid inquiries related to the candidate salary history and/or compensation to comply with pay equity legislation.

8. Religion or Creed

- Avoid inquiries into an applicant's religious denomination, religious affiliations or religious holidays observed.
- Applicants may be asked if they are available to work on Saturday or Sundays, if needed.

9. Affiliations

- Avoid asking applicants to list all clubs, societies and lodges to which they belong.
- Avoid any information which would solicit information on the race, color, religion, national origin or ancestry of its members.

10. Disabilities

- Avoid this area entirely. **Pre-job offer medical inquiries are prohibited!** Do not ask if applicants smoke, are under a doctor's care, if they have received disability insurance, about their general health condition, their workers' compensation history, or if they have any disability conditions.

11. Arrest Record

- Avoid inquiries; the background check will review the applicant's criminal history, if it exists.

Suggested Questions

As you prepare for the interview, you may want to develop additional questions based upon your review of the candidate's resume or the background material. Those candidate-specific questions might probe subjects such as:

- Explanation of gaps in time;
- Short tenure in position;
- Explanations of apparent weaknesses in experience or education/training; and
- Clarification on anything that is not clear.

Interviewing Techniques

In general, open-ended questions that require candidates to answer in sentences are preferable to closed-ended questions that can be answered with one word or "yes" or "no" answers. Open ended questions encourage the applicant to:

- Express goals, values, qualifications, or feelings;
- Exhibit his/her ability to communicate;
- Provide additional information regarding experience and background; and
- Probe "choice points".

Examples of open-ended questions include:

- How do you handle...?
- What do you do if...?
- How do you feel about...?
- What have you found to be successful in handling...?
- What are some examples of success in...?

Limited use of directive (closed-ended) questions can be used to gather information that is factual and objective.

As the interview proceeds, it is important to note the candidate's answers in addition to how content of the message is delivered. Body language and tone of voice are particularly important factors to notice. Probe for as many details as possible such as names, dates, and other verifiable information when necessary. It is also a good idea to ask candidates for their thoughts and feelings about a situation.

Additional Questions

Often candidates may be somewhat brief in their responses. If you feel a need for additional information, the use of probing questions such as the following can draw out additional information:

- Why did you say that?
- Can you think of an example of that situation?
- Is there something noteworthy in your experience in this area?

Other Considerations

Other considerations include how the candidate handles the stress of the interview and whether he or she appears to be avoiding some area(s) of inquiry.

Immediately after the interview, it will be helpful to note your overall feeling about the discussion and how you feel about the candidate.

Remember, the best predictor of success in any position is previous success in the same or similar position. Look for information on accomplishments and things the applicant has actually performed.



CANDIDATE EVALUATION FORM



CANDIDATE 1 – NAME

COVER LETTER AND RESUME

Candidate Questionnaire

Name	Click here to enter text.	Primary Phone	Click here to enter text.
Email	Click here to enter text.		
Education	Click here to enter text.		
Certifications / Specialized Advanced Training	Click here to enter text.		

	Current (Most Recent) Position	Previous Position	Previous Position
Title	Click here to enter text.	Click here to enter text.	Click here to enter text.
Dates of Employment: <i>(Include start/end dates by month/year)</i>	Click here to enter text.	Click here to enter text.	Click here to enter text.
Organization	Click here to enter text.	Click here to enter text.	Click here to enter text.
Please describe: a) <i>reason for departure with each change in employment, and</i> b) <i>reason for gaps in employment.</i>	Click here to enter text.	Click here to enter text.	Click here to enter text.
Reports To (Title)	Click here to enter text.	Click here to enter text.	Click here to enter text.
# of Direct Reports	Click here to enter text.	Click here to enter text.	Click here to enter text.
Total city/county budget	Click here to enter text.	Click here to enter text.	Click here to enter text.
Population of city/county served	Click here to enter text.	Click here to enter text.	Click here to enter text.

Instructions:

The purpose of this questionnaire is to provide us with additional information about you as a candidate and to gather examples of professional work that illustrate your background and experience. This information will be shared with hiring officials and others involved in making decisions about candidates selected to move forward in the selection process.

Please respond to each of the following questions by providing pertinent information. Some questions ask you to provide examples; please be sure to describe your direct level of involvement in the project or initiative. **Please be succinct – limit your responses to 300 words per question.**

1.	Why are you interested in the City Administrator position at this specific time?
Click here to enter text.	
2.	Describe your current scope of responsibilities and explain how these responsibilities prepare you to take on the leadership and management responsibilities of the City Administrator position for the Sample City.
Click here to enter text.	
3.	What has been your role in working with members of a governing body, collectively and individually? What steps do you take to support the governing body’s policy-making activities?
Click here to enter text.	
4.	Describe your leadership philosophy. What steps do you take to cultivate trust, collaboration, and a strategic mindset among the City’s leadership team?
Click here to enter text.	
5.	Explain your budget philosophy and the level of involvement you seek from City leadership and department directors in the budget development process.
Click here to enter text.	
6.	Briefly describe the most significant economic development partnership you have developed or managed. What was the project? What was your role? What was the outcome?
Click here to enter text.	
7.	What is your view towards employee training, development, and advancement? What is one outcome that reflects your view or philosophy on employee development?
Click or tap here to enter text.	
8.	Tell us about the feedback you have received from peers, supervisors, and subordinates with whom you work regarding your strengths as a professional leader and manager.
Click here to enter text.	

Due Diligence Form

Name: _____

1. Do you have any concerns about the posted salary range for this position? Yes No

2. If selected for the City Administrator position, what is the length of notice you must give to your current employer and when will you be available to start employment with the Sample City?

3. Have you been subject to any disciplinary actions, including suspension, probation, or demotion in your adult working career through your employer, a professional association, or licensing agency? If so, please explain. Yes No

4. Have you been dismissed, asked to resign, or accepted a mutual separation agreement and/or severance? Are you currently negotiating a separation agreement? If yes to any, please explain the circumstances. Yes No

5. Have you been subject to a formal charge regarding a conflict of interest, violation of ethical conduct, malfeasance or misfeasance in the performance of duties? If so, please explain. Yes No

6. If requested, are you able to provide written performance evaluations, or performance reviews for the past two years? Yes No

7. Have you been in your current, or most recent organization, for less than two years? If yes, please explain why you are interested in a career move at this time. Yes No

8. Is there anything in your professional or personal background, conduct or history that a past or future employer or constituent may find concerning, or questionable, or that could impair your ability to perform your work, if said information emerged at a later date? If yes, please explain. Yes No

9. Have you ever been the subject of media reports, social media postings, or blogs in the communities where you have worked that make adverse statements about your work? (We encourage applicants to disclose all information and allow us the opportunity to discuss any issues that may be a concern.) Yes No

I understand that if reliable information arises contrary to my above responses it could result in the disqualification of my current application or any future searches.

Signature _____

Date _____

REFERENCES

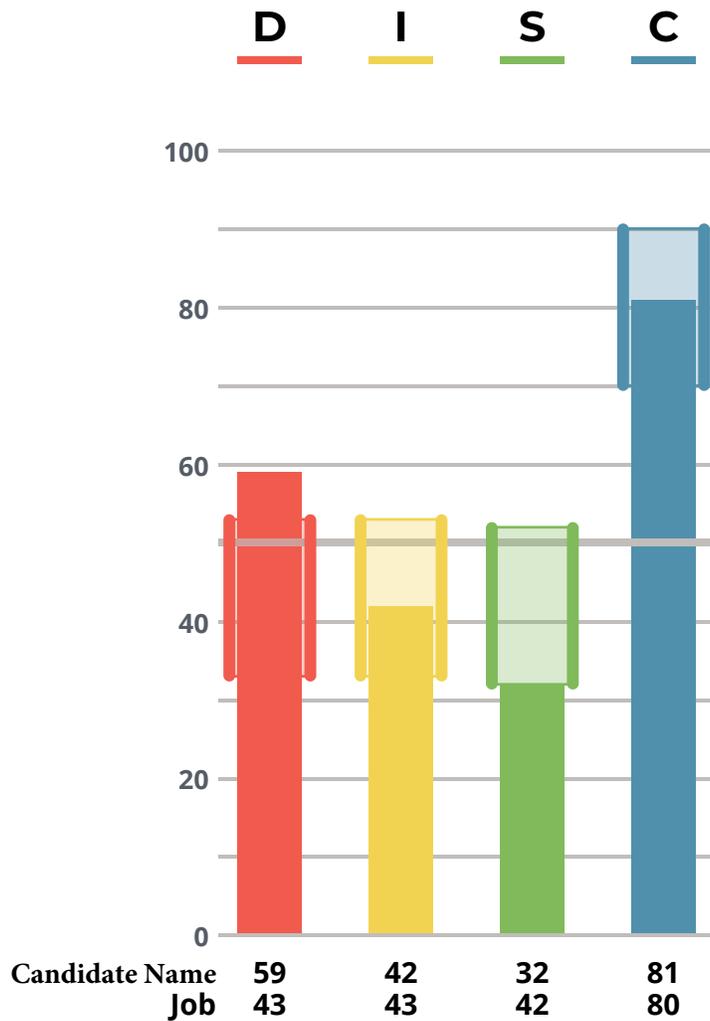
LEADERSHIP ASSESSMENT RESULTS

Workplace Behaviors®



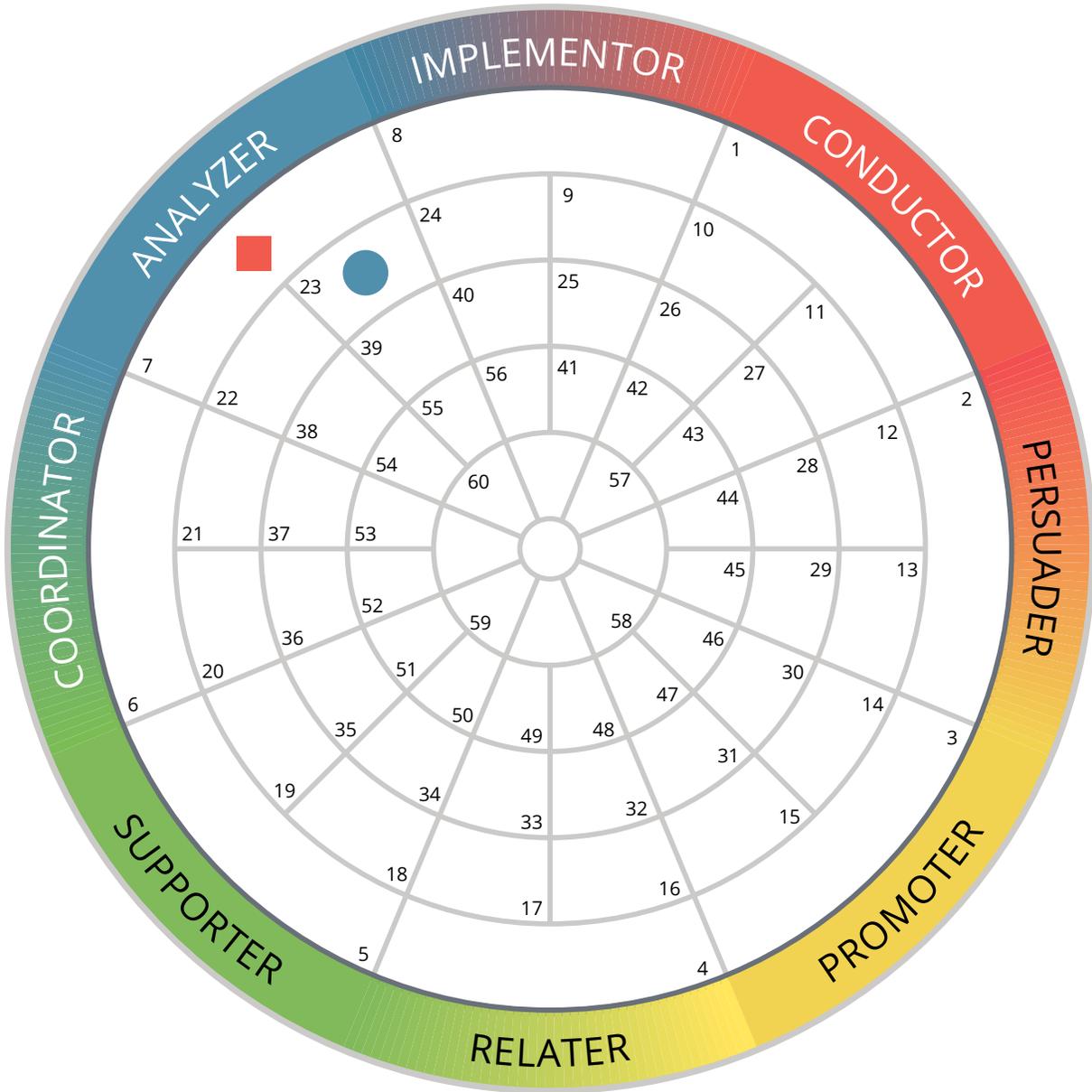
Candidate Name

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



 Job Range (20 point range)

The Success Insights® Wheel



■ Job - (7) ANALYZER

● Candidate Name - (23) IMPLEMENTING ANALYZER

Comparison Analysis

For Consulting And Coaching



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

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

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

 Exact match
  Fair compatibility
  Good compatibility
  Poor compatibility
  Over-focused



Beloit
WISCONSIN



CITY MANAGER

CITY OF BELOIT, WISCONSIN

First Review of Applications: November 11, 2022



PUBLIC SECTOR EXECUTIVE RECRUITMENT

BELOIT COMMUNITY

The Beloit community prides itself on its diversity, heritage, resiliency, and entrepreneurial spirit. Located along the Wisconsin-Illinois border, this transforming community is developing quickly and presents significant opportunities for the future. The City of Beloit serves as the Gateway to Wisconsin, located near Interstates 39/90 and Interstate 43. Beloit is strategically located for convenient access to much of the upper Midwest and the major metropolitan areas located in this region of the country. The City's diverse population estimate is 36,162; however, the Greater Beloit market area is home to 110,000 residents. The City is especially proud of its recreational amenities, including its beautiful riverfront, providing recreational and special event facilities, biking and hiking paths, and other amenities actively used on a year-round basis.

The City Center has undergone a complete transformation in the last decade and includes a charming downtown with tree-lined streets serving the pre-20th century commercial buildings, the internationally renowned Beloit College and beautiful, historic residential neighborhoods. Newer neighborhoods provide modern housing amenities in all price ranges, from entry level to high-end, custom-built homes. Beloit combines the qualities of metropolitan living with the charm and neighborliness of a small town.

The junction of two interstate highways in Beloit provides excellent transportation to the area, connecting the community to Milwaukee, Madison, Rockford and Chicago – all within a short drive. Because of its excellent geographic location, Beloit has enjoyed a history of supporting manufacturing, warehousing, and distribution centers for many major corporations.



395
FTEs



36,162
Population

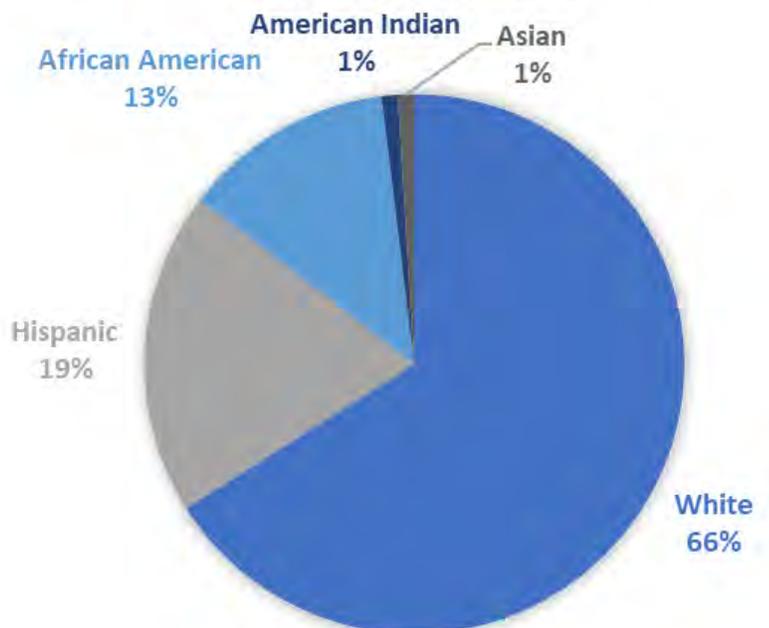


AA-
Standard & Poor's
Credit Rating



\$149M
City Budget—
All Funds

DEMOGRAPHICS



THE MUNICIPAL ORGANIZATION

The City of Beloit, founded in 1836 and incorporated as a city in 1856, has operated under the statutory form of Council-Manager government since 1929. The City Council is the policy-making body of the City and consists of seven members who are elected on a non-partisan basis for two-year overlapping terms of office. A Council President, who serves as the Chair of the Council, is selected from among the Council by its Members. The City Manager is considered by statute to be the CEO of the municipal corporation. The Manager is appointed by the Council as a whole and is responsible for the overall supervision and administration of the City government.

The City of Beloit provides comprehensive municipal services, which includes full-time police and fire protection including emergency medical services; the construction and maintenance of City streets; refuse collection and disposal; community planning and development; economic development; a complete parks and recreation program; and public library. The City operates as municipal enterprises a golf course; cemeteries; the sewer, water and storm water utilities; mass transit; and public housing. Natural gas and electricity are provided by Alliant Energy.

The City enjoys a strong financial position with an AA- credit rating by Standard and Poor's reflecting its growing economy and healthy operating reserves. The City of Beloit has adopted a 2022 all-funds operating budget of \$149 million (operating - \$83.2 million, capital - \$52.2 million, internal services funds – \$13.6 million).

City services are provided by approximately 350 full-time employees in the following departments: City Manager, Fire, Police, Library, Public Works, Community Development, Economic Development, Finance and Administrative Services, Information Technology, Human Resources, and City Attorney.

MISSION STATEMENT

The City of Beloit's mission is to provide outstanding public service.



CORE ORGANIZATIONAL VALUES

- B – Be Safe:** Safety comes first. We each play a role in the health, safety and welfare of the public at large and must act in ways that enhance our own personal safety, the safety of our co-workers and those we serve.
- E – Ethical Behavior:** We are dedicated to high ethical and moral standards and uncompromising honesty in our dealings with the public and each other. We do what we say we are going to do.
- L – Leadership:** Is developed and shared throughout the organization with an emphasis on continuous improvement.
- O – Outstanding Public Service:** We are committed to providing outstanding services to our diverse public and internal customers.
- I – Inclusion of Diverse People and Ideas, Creating a Sense of Belonging:** We respect the unique contributions of our fellow employees, residents, groups, and organizations throughout the community by seeking out their opinions, talents, and needs.
- T – Teamwork to Creatively Solve Problems:** We are a team of diverse employees, working internally across departments and divisions, as well as externally with our many stakeholders to creatively solve problems.

NEIGHBORHOOD AND CULTURAL AMENITIES

The community is home to beautiful parks, numerous cultural opportunities, and caring neighborhoods. Beloit has over 900 acres of scenic parks which provide ample areas for active and passive recreation. Nearly 200 civic, youth, music, art, garden, professional service, social, veteran, and fraternal organizations bring enrichment to all who join. The City is also home to a Chamber orchestra and a Civic Theater that are both very popular. Each year, Beloit hosts an international film festival that lasts for two weeks and brings in visitors from all over the world. An active YMCA facility as well as a Boys and Girls Club offer a variety of recreational and educational opportunities. Beloit has a strong faith community with over 70 churches representing 26 denominations.

Numerous attractions and venues which draw visitors and enhance the quality of life for residents in the community include the Welty Environmental Center, Krueger-Haskell Golf Course, Beloit College Poetry Garden, the restored Beckman Mill, Logan Museum of Anthropology, the Beloit Historical Societies' Lincoln Center Museum and the Hanchett-Bartlett Homestead.

A brand-new Minor League ballpark was opened in 2021, offering an enhanced fan experience for baseball fans in Beloit and beyond. Home of the Beloit Sky Carp Minor League baseball team, the ABC Supply Stadium offers state-of-the-art amenities while serving as a multi-purpose, year-round event center in downtown Beloit.

Beloit's riverfront park system includes vibrant community spaces for all and extends through downtown Beloit along the east bank of the Rock River. Riverside Park hosts concerts every Friday evening in the summer months, cultural festivals, and events for children and families, including paddleboat rentals and a canoe/kayak launch. Beloit has the second largest Farmer's Market in the state of Wisconsin with more than 5,000 people attending every Saturday morning in the late spring through the early fall.

The City's robust Public Library is a source of community pride. A part of a repurposed, aging shopping mall, the Library represents the best of Beloit's renaissance with a state-of-the-art facility that is enjoyed by residents and visitors of all ages. The Library has partnered with Blackhawk Technical College to provide several educational spaces, as well as a heavily utilized community spaces which have become a gathering place for community organizations.



BELOIT'S BUSINESS COMMUNITY

The City's economy is diverse and very active. Greater Beloit is the home of numerous industrial firms, several corporate headquarters, and many retail establishments.

- Beloit is also home to the worldwide headquarters of the Hendricks Companies including ABC Supply, Hendricks Holdings and Hendricks Commercial Properties, an involved and dedicated corporate resident.
- Other major employers in the Greater Beloit area include the Amazon, Beloit Health System, School District of Beloit, Birds Eye, Taylor Company, Frito-Lay, Amazon, Beloit College, Kerry America, Fairbanks Morse Defense, Kettle Foods, and Hormel Foods.
- Downtown Beloit is the historical, economic, cultural and social center of the community. Located north of the confluence of the Rock River and Turtle Creek, the downtown is anchored by a core of historic buildings and the redeveloped Ironworks office and industrial campus.
- The City's 450-acre Gateway Business Park located along Interstate 39/90, holds numerous manufacturing, industrial and office campuses. The business park also includes office, multi-family and single family uses. The Gateway Business Park is currently home to G5 Brewing Company, NorthStar Medical Radioisotopes, Pratt Industries, Amazon, Staples, Chicago Fittings, and Kettle Foods.
- Final approval for a Ho-Chunk Casino in Beloit was granted by the federal government in May 2022. The Ho-Chunk Nation owns 32 acres of land in Beloit and construction is expected to start in 2023. The complex will include one of the largest casinos in the state, as well as a 300-room hotel, 45,000 square feet of meeting and convention space, and a waterpark.

EDUCATIONAL OPPORTUNITIES

The City is served by Beloit School District which serves nearly 6,000 students with six elementary schools, four intermediate schools, and one high school. The Lincoln Academy, a new tuition-free public charter school, serves students in grades 4K through 12. The Lincoln Academy specializes in project-based and experiential learning models by providing career exploration and real opportunities and choices for graduates. Beloit Turner School District covers portions of the City of Beloit and has an elementary school, intermediate school, and a high school. The City is also served by a few private schools.

The City is also the host community to Beloit College, located just a block from Downtown Beloit. Beloit College is a private liberal arts college chartered in 1846. Today, Beloit College, with an enrollment of 1,300 students from 43 states and 39 countries, enjoys a national reputation for excellence. From its 40-acre wooded campus, the College serves as a cultural center for the community, offering a wide variety of theatre productions, lectures, concerts, and art exhibitions. Beloit College is one of the oldest institutions of higher learning in the state of Wisconsin and provides innovative educational programs for community residents of all ages as well as undergraduate degrees in 50 fields of study. Blackhawk Technical College has class offerings in Beloit as well as a main campus located between Beloit and Janesville. Blackhawk Technical College provides technical training to Rock County area students as well as current workers and designs customized training for area employers.



THE POSITION

The City Manager has full appointing and oversight authority for the operation of the various City divisions and departments and has the responsibility of carrying out policies adopted by the Council. The leadership team is comprised of the City Attorney/Deputy City Manager, Community Development Director, Economic Development Director, Finance and Administrative Services Director, Fire Chief, Human Resources Director, Information Technology Director, Police Chief, and Public Works Director.

Management and Leadership Traits:

- Functions as the face of the City; is involved in community events and makes connections with local businesses and industries; appreciates and celebrates the diversity of the community.
- Engages with staff and builds one-on-one relationships; has a strong ability to inspire, motivate, and instill confidence and pride in staff and leadership.
- Proven and successful visionary leader who upholds City values, leads by example, and inspires respect and trust.
- Strategic and innovative thinker who is approachable and responsive to all stakeholders; brings creative ideas to the table and presents complete information so City Council can make informed decisions; provides realistic expectations.
- Good fiscal steward that fosters and promotes a culture of accountability and transparency.
- Diplomatic, apolitical, open-minded, innovative, forward thinker, and a professional who embraces input and can build consensus on even contentious issues. Be honest, trustworthy, warm, and responsive, able to build rapport with anyone.
- Visionary that works collaboratively with internal and external stakeholders to promote new business development, economic development and redevelopment.
- Embraces the community, the region and the regional partners with a genuine desire to engage and where appropriate work with residents, businesses, neighboring governmental units, the education community, and not for profit organizations.
- Possesses complete integrity that exemplifies professional and personal characteristics of impeccable behavior which meet the highest ethical standards.



LEADERSHIP OPPORTUNITIES

Community Engagement—The next City Manager is expected to be the “Face” of the City both externally and internally. They will need to have a high comfort of social engagement coupled with experience in developing effective multi-faceted outreach, engagement, and social media programs to connect the City, its programs and services, its employees, its residents, and stakeholders.

Communication—The next City Manager is expected to provide engaging and transparent information to staff, residents and stakeholders using inclusive modern and strategic methods.

Community and Economic Development—The City of Beloit is currently pursuing several economic development projects that will complement the historic nature and character of the community. The next City Manager will collaborate with a host of community stakeholders committed to working with minimum bureaucracy.

Housing—Beloit is experiencing a housing issue similar to many other markets across Wisconsin that is causing a shortage of homes in all price ranges. The next City Manager will work to find systematic approaches to address these issues including affordable housing.

Marketing and Community Image—Beloit has an image, and that image to the outside world may be very different to what the community knows to be true. The City Manager will help develop a strategic plan to enhance and promote the City’s image and to highlight the many successes Beloit has achieved.

Recruitment and Retention—As with any service-driven organization in the current work environment, the ability to attract and retain excellent talent is an ongoing challenge. The next City Manager will work with the staff to improve employees’ work-life balance. The City leaders would like to see greater diversity among the organization’s staff, reflective of the city’s demographics.

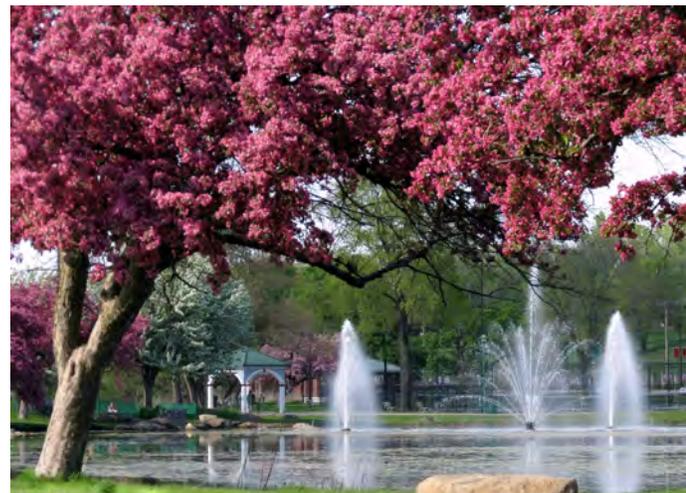
EDUCATION AND EXPERIENCE

The ideal candidate will have a Bachelor’s degree in public administration, public policy, planning or related field; a Master’s degree is highly desirable. The candidate must have a minimum of 7 or more years of progressive leadership/ management experience in a similarly complex community with the ability to show competence in key operational areas of city government including finance, budgeting, public safety, public works, and economic development. An International City Manager Association Credentialed Manager and / or Local Government Executive Institute education is highly preferred.

COMPENSATION AND BENEFITS

The City of Beloit is offering an attractive hiring salary range of \$170,000 to \$185,000, commensurate with experience and qualifications. The City of Beloit offers an excellent benefits package including 90% medical / dental premiums paid by the City, car allowance, cell phone, holidays, sick, vacation, and participation in the Wisconsin Retirement System, which is administered by the State. Residency within the City is expected and relocation assistance is negotiable.

The City seeks to attract the most talented people from a diverse candidate pool, and strongly encourages women, people of color, LGBTQIA+ individuals, people with disabilities, and veterans to apply.



APPLICATION AND SELECTION PROCESS

We invite qualified professionals to submit a cover letter and resume by visiting our website at:

[GovernmentJobs.com/Careers/BakerTilly](https://www.governmentjobs.com/careers/bakertilly)

This position is open until filled; however, a first review of resumes will occur on **November 11 2022**. Following this date, applications will be screened against criteria outlined in this brochure. The City will consider offering an interview to those candidates named as Finalists, with reference, background, and academic verification checks conducted after receiving candidates' permission. The City will reimburse expenses for in-person interviews. For more information, please contact:

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The City of Beloit is an Affirmative Action/Equal Employment Opportunity Employer. To learn more about the City of Beloit, please visit their website at: <https://www.beloitwi.gov/>



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