



Board Report 22-52

Date: September 29, 2022

To: Board of Deferred Compensation Administration

From: Staff

Subject: Defined Contribution Plan Manager Update: Executive Recruitment

Board of Deferred Compensation Administration

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Recommendation:

That the Board approve the selection of Partners in Diversity's bid for the Defined Contribution Plan Manager (DC Plan Manager) recruitment opportunity.

Discussion:

A. Background

The Board, working together with its Ad Hoc DC Plan Manager Selection Committee (Committee) and staff, has taken a number of actions with respect to developing and filling the new DC Plan Manager position. This position will provide executive leadership for the Deferred Compensation Plan (DCP). A summary of Board and Committee actions to date regarding the DC Plan Manager position is provided in **Attachment A**.

Specifically relating to the procurement of an executive recruitment firm, the follow has occurred:

- July 28, 2022 – DCP staff worked with the Personnel Department's executive recruitment section to issue a task order solicitation (TOS) to the Personnel Department's bench of three executive recruitment firms: The Energists, Partners in Diversity, and The Hawkins Company.

- August 5, 2022 – Only one firm submitted a proposal. Staff consulted with the Personnel Department’s Administrative Services Division to review options to garner additional responses.
- August 7, 2022 – Staff issued a revised TOS with a new proposal deadline of August 17, 2022.
- August 17, 2022 – Staff received proposals from The Energists and Partners in Diversity.
- August 18 - September 14, 2022 – Staff reviewed and rated the proposals.

B. Task Order Solicitation (TOS)

The TOS issued to the Personnel Department’s bench of executive recruitment firms requested the development and implementation of a nationwide recruitment search of qualified candidates for the role of a DC Plan Manager. The full TOS is included as **Attachment B**.

All tasks within the TOS’s scope of work were requested to be completed within approximately three months. The firms were asked to provide pertinent experience filling senior leadership positions in the retirement planning industry (public or private sector), if any, and demonstrate the ability to facilitate the completion of a work plan.

C. Evaluation Criteria

The evaluation criteria for the TOS were grouped into four weighted categories: (1) capability and availability, (2) experience and performance, (3) qualifications, and (4) cost effectiveness and billing rates. Each solicitation response was assessed through independent evaluation by DCP staff and provided with a quantitative, numerical rating. The assessed rating was based on how the response met factors identified in each category of the evaluation criteria. The quantitative rating for each category was out of a 100-point scale. For further assistance in applying the quantitative scoring, staff identified a qualitative rationale towards bands of numerical scores. A score that fell 1 within the range of 90-100 points would be awarded to a response that “Exceeds Expectations” for their demonstration of far surpassing the requested standard in the TOS. A score that fell within the range of 80-89 points would be awarded to a response that met “Satisfactory Requirements” for their demonstration of comfortably meeting the requested standard in the TOS. A score that fell within the range of 70-79 points would be awarded to a response that met “Minimum Requirements” for their demonstration of being able to meet, and not exceed, the requested minimum standard in the TOS. A score that fell below 70 points would be awarded to a response that met “Below Requirements” where the the requested standard in the TOS was not met or the answer was not provided. The four qualitatively rated categories were then weighted by the weighted percentage for the overall category to provide a final total score.

D. TOS Evaluation and Findings

Staff received proposals from two firms from the Personnel Department's bench of executive recruitment firms, The Energists (**Attachment C**) and Partners in Diversity (**Attachment D**). Two members of the DCP's staff completed the evaluation: Daniel Powell, Senior Personnel Analyst II, and Eric Lan, Benefits Analyst. Following is a summary of the scoring evaluations according to each rating category.

1. Capability and Availability

Staff evaluated both responses based on the capability and availability of their project team to provide the scope of work. Additionally, the firms were rated on their availability to complete the work within a reasonable timeframe and manage complex efforts. The Energists and Partners in Diversity were given scores of 91 and 95, respectively, in that both firms provided a response which staff deemed as "Exceeds Expectations". Staff believes that both firms showed clear ability to perform and complete the TOS's scope of work adequately.

The Energists' team of CEO Jonathan Hill and two additional staff members, for a total of a three-member team, proposed completing its executive recruitment within approximately two months and provided a clear technical approach towards its recruitment plan.

Partners in Diversity would be led by Kate Harrington and two additional staff members, for a total of a three-member team, but with the occasional as-needed support of two additional support staff. Partners in Diversity provided a solid and detailed approach towards its recruitment plan and proposed completing its recruitment within the TOS timeframe of three months.

Additionally, both firms demonstrated capability and flexibility to coordinate with the Board on the interview and selection process.

2. Experience and Performance

The next aspect of evaluation reviewed the firms' experience leading efforts of a similar or related nature and requested past performance to deliver projects of similar scope with respect to quality, adherence to set budget and schedule.

The Energists received a score of 66.5, for a response which staff deemed to be "Below Requirements", since their submitted response did not provide any history of past performance with projects of similar scope. After a follow-up inquiry from DCP staff, the firm did state that they had experience filling senior-level investment management positions, however the TOS specified that the search was for an executive-level manager for the DCP that would be able to

provide “overall management and oversight of the administrative, operational, contractual, supervisory, and communication functions of the DCP.” Additionally, no budget was provided by The Energists as requested in the TOS. Staff determined that the lack of specificity in The Energists’ proposal was below the listed requirements.

Partners in Diversity received a score of 82 for a response which staff deemed to meet “Satisfactory Requirements” due to their listed experience with public agencies such as the Los Angeles Metropolitan Transportation Authority and the Greater Los Angeles Veterans Administration. *Partners in Diversity’s* experience in filling several executive level positions within other public and private organizations satisfies the requirement listed in the TOS. While *Partners in Diversity* did not have any specific experience within the retirement planning industry, which was desired, staff believes that their experience with other public sector organizations will be relevant and applicable for the DC Plan Manager recruitment.

3. Qualifications

Staff evaluated the experience and qualifications of the project manager’s time dedicated to project management responsibility and oversight.

The Energists’ project manager would be their CEO, Jonathan Hill. Staff determined that their response to this requirement only met the “Minimum Requirements”, as additional information about his experience and history was absent. In the follow-up inquiry by DCP staff, *The Energists* noted that their supporting staff have experience with benefits administration. As a result, *The Energists* received a score of 74.5 in this category.

Partners in Diversity’s project manager is Kate Harrington, a founder of the firm who directly manages and implements recruitments. Staff determined that their response as “Exceeds Requirements” due to her indicated 20 years of experience and her national search and sourcing efforts in recruitments. As a result, *Partners in Diversity* received a score of 89.5 in this category.

4. Cost Effectiveness and Billing Rates

Staff evaluated the final category according to the value offered considering cost of the contract in comparison to professional capabilities and experience of the project team and the firms’ innovation and cost-effectiveness in the approach to the tasks.

The Energists received a score of 80 for a response which staff deemed to meet “Satisfactory Requirements” due to their proposal specifying a placement fee of 30% of the candidate’s first-year annual salary.

Partners in Diversity received a score of 92.5 for a response which staff deemed “Exceeds Requirements” due to their proposal specifying a placement fee of 23% of the candidate’s first-year annual salary.

Both firms have a provision in their main contracts with the Personnel Department that requires a new placement process, for up to one year following the start date of a candidate in the event the original candidate ceases to be employed by City.

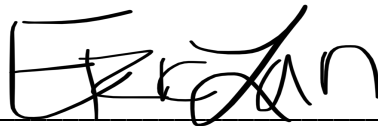
The full summary of the evaluation results is shown below:

Weight	Criteria	Energist Holdings Average Ratings	Partners in Diversity Average Ratings
35%	Capability and Availability	91.0	95.0
35%	Experience and Performance	66.5	82.0
15%	Qualifications	74.5	89.5
15%	Cost Effectiveness and Billing Rates	80.0	92.5
100%	Total Weighted Score	78.3	89.3
	Scoring Range and Qualitative Rating	70-79 – Minimum Requirements	80-89 – Satisfactory Requirements

E. Conclusion and Next Steps

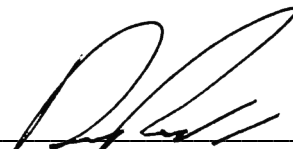
Based on the evaluation summary provided in the report, staff recommends the selection of Partners in Diversity’s bid. If Partners in Diversity is selected, staff will work with the Personnel Department to authorize the start of work and will bring a detailed project plan to the DCP’s Ad Hoc DC Plan Manager Selection Committee.

Submitted by:



Eric Lan, Benefits Analyst

Reviewed by:



Daniel Powell, Senior Personnel Analyst II

CHRONOLOGY OF DC PLAN MANAGER BOARD AND COMMITTEE ACTIONS

June 25, 2020	The Board of Civil Service Commissioners approved the creation of the new DC Plan Manager classification.
October 20, 2020	The Board approved staff recommendations with respect to recruitment and salary considerations for the DC Plan Manager position, including requesting exemption of the new position from civil service, requesting an unfreeze to fill the position, and setting the salary at the level of Chief Personnel Analyst.
April 14, 2021	The City Council approved an ordinance to establish the salary range of the DC Plan Manager classification at the level of Chief Personnel Analyst.
June 15, 2021	The Board established an Ad Hoc DC Plan Manager Selection Committee to develop recommendations for the Board to make to the Personnel Department regarding selection process design and content.
July 7, 2021	The Committee met to consider certain materials drafted by staff, including proposed recruitment materials.
July 20, 2021	The Board requested that the Personnel Department initiate the examination development process if indication regarding the request for exempt status was not received from the Mayor's Office by July 23, 2021 (which it was not); and requested that the Personnel Department provide a response regarding elevating the DCP's Senior Benefits Analyst I position to Senior Benefits Analyst II.
August 17, 2021	The Board approved requests for submission with regards to the Fiscal Year (FY) 2022-23 proposed budget, including adding regular position authority for the DC Plan Manager position and requesting that the City Administrative Officer Employee Relations Division make a paygrade determination to elevate the Senior Benefits Analyst I to Senior Benefits Analyst II; the Board further authorized the Board Chairperson to approve any documents required to transmit the FY 2022-23 budget requests to the CAO and Office of the Mayor on behalf of the Board and requested that the Personnel Department submit the afore-noted requests to the Office of the Mayor. Materials were subsequently drafted and reviewed/approved by the Board Chairperson.
November 16, 2021	The Board modified its instructions to the Committee to request that it develop recommendations for the Board to make to the Personnel Department regarding conduct of the DC Plan Manager selection process up to and including execution of the final selection process and onboarding of the appointee; and further recommended to the Personnel Department General Manager that Steven Montagna be placed in-lieu of the DC Plan Manager position beginning on or around January 1, 2022 and ending with the appointment of a permanent DC Plan Manager but no later than April 29, 2022.
December 8, 2021	The Committee met to develop recommendations to the Board with respect to the selection process.
December 15, 2021	The Committee met to discuss consequences of the potentially small number of viable applications available to consider via the examination process.
December 21, 2021	The Board (a) authorize the Board Chairperson to, in consultation with staff, draft and submit a communication to the Office of the Mayor renewing the Board's request that the DC Plan Manager position be exempted from civil service; (b) request that staff develop a proposal for the most expedited process practical for securing the services of an executive recruiting firm; (c) recommend to the Personnel Department that the vacant Senior Benefits Analyst I

	position dedicated to the DCP be filled as soon as practical; (d) recommend to the Personnel Department that it, upon filling the Employee Benefits Division's successor Chief and Senior Benefits Analyst II positions, provide DCP administrative training to these staff so they can support the DCP until the permanent appointment of a DC Plan Manager; (e) solicit a Board member volunteer to serve as an examination rater and request that staff solicit participation from a comparable large plan executive administrator to serve, if available, as an additional rater for the DC Plan Manager examination; and (f) find that final selection interviews should be conducted by all Board members interested in participating.
January 18, 2022	The Board (a) requested that staff work with the Ad Hoc DC Plan Manager Selection Committee to develop a work experience questionnaire, advisory essay, position and process overview, and interview questions, for use as applicable in the DC Plan Manager selection process; and (b) approved moving forward with advancing the selection process.
January 26, 2022	The Ad Hoc DC Plan Manager Selection Committee finalized the work experience questionnaire, advisory essay, and position and process overview.
February 18, 2022	Materials (including the work experience questionnaire, advisory essay, and position and process overview acknowledgment) were received from three candidates.
February 24, 2022	The Board met in a special meeting to confidentially review candidate submissions for the purpose of proceeding to virtual interviews of three candidates on March 15, 2022.
March 15, 2022	The Board met in a special meeting to confidentially conduct interviews of three candidates for the DC Plan Manager position. The Board was not able to recommend selection of one of the candidates pursuant to that interview process.
March 29, 2022	The Board met in a special meeting to recommend to the Personnel Department General Manager that a request to the Office of the Mayor to exempt the position of DC Plan Manager be issued concurrently from the Personnel Department General Manager and Board Chairperson and Vice-Chairperson. The Board further requested that staff review the services and resources offered by the Personnel Department's contracted executive recruitment providers and prepare a recommendation for the Board to work with a specific provider.
June 17, 2022	The request for exemption of the DCP's DC Plan Manager was approved by the Personnel, Audits, and Animal Welfare Committee.
June 24, 2022	The request for exemption of the DCP's DC Plan Manager was approved by City Council.
June 28, 2022	A bench of three executive recruitment firms from the Personnel Department were offered the ability to bid on recruitment opportunities. A task order solicitation (TOS) for the DC Plan Manager position was offered and developed in tandem with DCP staff, requesting that the firms indicate their experience recruiting senior leadership positions in the retirement industry, with a deadline of July 11, 2022. City staff also reached out to large City departments to inquire whether there are other existing executive recruitment contracts available to the DCP. Departments responded by indicating that their contracts had lapsed or that they used the Personnel Department's bench of contracts.
August 5, 2022	Only one response to the original TOS was received. After consultation with the Personnel Department's Administrative Services Division, staff made minor adjustments to the TOS and the proposal deadline.
August 7, 2022	A revised TOS was issued with a due date of August 17, 2022 due to there only being one response to the original TOS.
August 17, 2022	Two responses to the DCP's TOS were received and reviewed. DCP staff reviewed and rated the responses, presenting the results to the Board at its meeting on September 29, 2022.

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LOS ANGELES, CA 90012

Dana H. Brown
GENERAL MANAGER

TASK ORDER SOLICITATION

August 5, 2022

Energists Holdings, LLC (C-140205)
Partners In Diversity, Inc. (C-140216)
The Hawkins Company (C-140324)

**EXECUTIVE RECRUITMENT FOR DEFINED CONTRIBUTION PLAN MANAGER RESIDING
WITHIN THE PERSONNEL DEPARTMENT**

BACKGROUND

Personnel Department Executive Recruitment Services

The City of Los Angeles, Personnel Department (“Department”) requests proposals from a qualified executive search firm (“Firm”) on the prequalified bench list (RAMPLA Opportunity ID# 200482) to conduct an extensive recruitment and selection effort for the executive and/or difficult-to-fill position(s) as outlined in the scope of work below. Proposals will only be accepted from firms on the prequalified list associated with the aforementioned RAMP opportunity.

Personnel Department

The Department is seeking a creative, innovative, and experienced defined contribution plan professional with either private or public sector experience to manage its Internal Revenue Code Section 457 Deferred Compensation Plan (“DCP”) for full-time and half-time employees, which is administered by the Personnel Department’s Employee Benefits Division.

The Defined Contribution (“DC”) Plan Manager is responsible for the overall management and oversight of the administrative, operational, contractual, supervisory, and communication functions of the DCP. The DC Plan Manager resides in the City’s Personnel Department and acts as the DCP staff advisor to the City’s Board of Deferred Compensation Administration (“Board”). The DC Plan Manager oversees, and is primarily responsible for ensuring that DCP staff support the Board in executing its fiduciary role for the DCP and the DCP’s participants, which include performing the following core duties:

- Supervising a team of staff performing the administrative, engagement, reporting, and related operational functions of the DCP.
- Carrying out decisions and directives of the Board, including implementing policy and program directives.
- Procuring for and executing contracts for various administrative, investment, consultant, and other services.
- Directing contracted service providers.
- Providing analysis and policy recommendations regarding a variety of process, plan design, and administrative matters.

- Developing forward-thinking plan design and engagement initiatives to drive ongoing improvements in participant outcomes.

This position may further perform duties in connection with the City's Pension Savings Plan, a Social Security replacement plan established under Internal Revenue Code Sections 457/3121.

SCOPE OF WORK, SCHEDULE, AND BUDGET

Develop and implement a nationwide recruitment search of qualified candidates for the role of DC Plan Manager, which results in the selection of a qualified candidate to fill the role.

Tasks

All work and deliverables are expected to meet the requirements of existing state law and any changes to those laws while under contract. The following descriptions identify the minimum scope of work that may be provided by a qualified firm. The proposer should identify and explain any additional tasks that are recommended to meet the objectives of the department in the response to this solicitation letter. Additional detail regarding specific tasks will be further described in subsequent Notice to Proceed ("NTP") letters.

Selected firms should be prepared to perform any and all tasks related to a search and selection of a high-level executive or difficult-to-fill position, including, but not limited to:

1. Meet and confer with the Department and the Board throughout the entirety of the recruitment and hiring process. This may include written or oral progress reports at an interval dictated by the Department or upon request.
2. Meet and confer with the Department and any interested parties identified by the Department, which may include but is not limited to, the Mayor's Office, Boards of Commissioners, City Council members, union representatives, etc., regarding the duties and responsibilities of the position, minimum qualifications, and evaluation criteria.
3. Prepare professional, comprehensive, and attractive recruitment materials, which include information about the City, its governance structure, the department for which the vacancy exists, its offices, the vacant position including specific roles and responsibilities, and necessary minimum qualifications and desirable candidate characteristics.
4. Develop and implement a nationwide executive search utilizing a comprehensive marketing strategy to identify and attract the most qualified candidates from diverse backgrounds.
5. Develop and administer an evaluation and selection process of interested candidates, either on behalf of the Department or in partnership, including an evaluation of candidates through application/resume review and/or interview processes, and verification of professional and educational credentials, in order to identify the most qualified candidates.
6. Provide the Department with documentation and support of selection and non-selection recommendations.

Selected firms may also be required to supply the following *optional services* to the Department upon request:

1. Coordinate travel and accommodation arrangements for candidates and interviewers.
2. Re-conduct an executive search to fill the position should the selected candidate(s) resign or be dismissed for cause from City employment within one year of their appointment.

Schedule

All tasks, excluding optional services to be rendered upon request, will need to be completed to the satisfaction of the City within approximately 3 months of NTP execution. Proposals may recommend an alternative timeframe with justification if 3 months is not feasible. The Department envisages filling the vacant position on or about October 1, 2022.

Budget

The Department requests the firm provide an itemized budget for the completion of the aforementioned tasks. For tasks for which little detail is currently known or provided, the proposer should identify the budget which would be necessary to fulfill that task and explain assumptions about the scope of what can be accomplished within the allotted amount for a given task. Additional scope of work and recommended tasks should be itemized and included as optional in the proposer's proposed budget.

PROPOSALS

The City will review and evaluate all submitted proposals. Proposers should demonstrate:

1. Ability to start the project immediately upon award of the NTP;
2. Ability to facilitate continuity in staff assigned to the project;
3. Ability to develop an achievable work plan and meet or exceed project deadlines as outlined in the project schedule; and
4. Any additional information proving the ability to carry out the scope of work and deliverables.

Experience filling senior leadership positions in the retirement planning industry (public or private sector) is desired and would be viewed favorably by the City, but is not required.

Minimum Required Contents of the Proposal

- **Lead Project Manager:** Full name, office title, address, phone number, and email address.
- **Introduction:** Brief summary of the proposer's understanding of project objectives, scope, and tasks.
- **Technical Approach:** A description of the project approach and work plan that the proposer proposes to employ, including key deliverables, as identified in the scope of work or proposed by the proposer.
- **Team Identification:** Identify the personnel assigned to the project, including subcontractors, and tasks assigned to each member.
- **Budget and Fee Schedule:** Provide a budget which clearly shows the amount allocated to each task and a fee schedule showing staff assignment by task. Billings should be tied to project task milestone/deliverables completion. Fee schedule should show the number of hours for each task and hourly rates associated with each team member/job classification. Any work that would result in amounts exceeding the provided cost estimates shall require prior Department review and approval in writing. Cost estimates shall include reimbursable expenses, which shall be paid with prior approval of the Department.

Proposal Evaluation Criteria

The firm shall provide responses to this Task Order Solicitation ("TOS") that allow evaluation using the following criteria:

Capability and Availability (35%)

- Capability and availability of the firm’s project team to provide the scope of services and the team's expertise and experience as it relates to the scope of the project as demonstrated by the solicitation response.
- Availability to complete the work within a reasonable timeframe and manage complex efforts.

Experience and Performance (35%)

- Experience leading efforts of a similar or related nature.
- Past performance working as a firm to deliver projects of similar scope with respect to quality, adherence to set budget and schedule.

Qualifications (15%)

- Experience and qualifications of the project manager’s time dedicated to project management responsibility and oversight.

Cost Effectiveness and Billing Rates (15%)

- The value offered to the department considering cost of the contract in comparison to professional capabilities and experience of the project team.
- Demonstrates innovation and cost-effectiveness in the approach to the tasks.

Proposal Evaluation Process and Selection

Submittals will be evaluated by an Evaluation Committee based on the aforementioned selection criteria. The department reserves the right to interview firms to further evaluate qualifications. The department may choose not to hire the lowest cost proposal and may select the proposal that best fulfills the needs of the project according to the department’s discretion. The evaluation criteria will allow the department to examine the qualifications of the firm, the proposed staff, and the ability to meet the department’s needs described in the scope of work.

The department reserves the right to award multiple firms one or more tasks if it is in the department’s best interest. In addition, the department reserves the right to reject any and all proposals.

This TOS is not an authorization to start work. An NTP will be issued to authorize the start of work when your firm has been selected and your fee proposal has been accepted.

Proposal Submission Instructions and Deadline

Please submit your electronic signed proposal to per.contracts@lacity.org no later than 3:00 PM PT on August 17, 2022. No proposals will be accepted after this date and time. Proposals not received by the deadline will be deemed non-responsive and will be disqualified. Timely submission is the sole responsibility of the proposer. No fax or mailed submissions will be accepted. All proposals become property of the City of Los Angeles.

Submitted proposals shall be titled "Executive Recruitment Services – Personnel Department."

Task Order Solicitation
Defined Contribution Plan Manager

CONTRACT ADMINISTRATOR

For questions regarding this TOS, please contact the contract administrator listed below.

Jenny Yau
Chief Management Analyst
Personnel Department
700 E Temple St, Rm 375
Los Angeles, CA 90012
(213) 281-8508
jenny.mach@lacity.org

 for:
DANA H. BROWN
General Manager

DB/JV/JH:jv/jh



Est. 1979

August 17th, 2022

City of Los Angeles
 Personnel Department
 Personnel Building
 700 East Temple Street
 Los Angeles, CA90012

FAO: Dana H Brown, General Manager, Personnel Department c/o per.contracts@lacity.org

Re: Task Order Solicitation Executive Recruitment for Defined Contribution Plan Manager Residing Within the Personnel Department

Dear Dana,

Thank you for the opportunity to bid for the above-mentioned scope of work. We hope that this response provides the necessary information as requested in your letter. It sets out our proposed terms and conditions under which this assignment will be conducted, and defines our understanding of your requirements.

KEY INFORMATION

Lead Project Manager:	Jonathan Hill – for the duration of the project.
Other Team Members:	Dalia Moxon and Emma Hill will collaborate with Jonathan Hill for the duration of the project.
Subcontractors:	None
Scope of Services:	Traditional executive search process
Documentation:	System generated, tailored to fit LA City requirements
Travel & Accom.:	Coordination and facilitation provided as required
Availability:	Commence August 25th, 2022
Estimated Duration:	Two (2) months to offer letter – targeting October 1st, 2022.
Guarantee:	Twelve months

INTRODUCTION

Our understanding of the purpose of this role is to manage the administration of Los Angeles Deferred Compensation Plan and Pension Savings Plan, having oversight of operational, contractual, supervisory and communication functions of both.

The Energists

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 713-781-6881 • www.energists.com



The Plan Manager will serve as DCP Staff advisor to the Board of Deferred Compensation Administration and Manager of the PSP.

Advances the missions of the DCP/PSP through ensuring fulfillment of directives from the board and ongoing improvements, directs contracted service providers, and builds and maintains effective staff support for the DCP/PSP whilst fulfilling equal opportunity responsibilities.

TECHNICAL APPROACH

The Energists' search process consists of several key activities designed to identify, evaluate and place the best and most appropriate candidates for each position mandated, as summarized below.

A. Kick Off Meeting / Deep Dive – Duration: < One Day

Host a launch event to officially understand the objectives of the search and specific attributes (including diversity/equal opportunities metrics) desired in the ultimate appointee.

Assign search team members (included above) and confirm LA City's expectations on search progress reporting requirements (who, what and when) specific to the individual mandate.

An outline of the position scope and, goals, pertinent duties, responsibilities, and reporting relationships will be provided by LA City. Additionally, confirmation of contextual parameters such as organization operating philosophy, culture and top-level business goals (including ESG, diversity etc.) are helpful to optimize The Energists' effectiveness in representing LA City in attracting and screening the most appropriate candidates.

It is often the case, but not always required, that a client generated position description, and compensation & benefits budget, are conveyed prior to this meeting. In the absence of such, The Energists acts as informed counsel and provides guidance for consideration.

During this event The Energists will confer with the relevant LA City stakeholders (as a minimum, the hiring manager and HR representative) to discuss, agree and clearly define the skills, talents, behaviors and attributes of the individual(s) sought. These will include both essential and desirable criteria.

Iterate and rank these attributes to arrive at a consensus decision with the key decision maker(s) at LA City highlighting any perceived risks / complications as appropriate.

At the same time, the geographic limits of the search will be defined as will any bodies or companies considered "off limits".

B. Agree "Selling Memorandum" – Duration: Two Days

Prepare a position specification ("selling memorandum") for approval by LA City, describing the role in an attractive and informative manner, including details of the key qualifications, experience, and accountabilities.

This document forms the basis of an instructional pamphlet for the researcher and recruiter as well as a "sales" brochure for the role with respect to prospective candidates. The sales aspect focuses on the likely background of suitable candidates whilst highlighting specific elements of the employee value



proposition. At the same time, it is important that the specification is realistic as there is no merit in overselling the role to the point retention of an appointee becomes an issue.

Submit to LA City for review, comment, and approval.

C. Research & Long List Generation – Duration: Continuous

This first part of this stage involves the construction of a market map of potential companies and/or government bodies that are likely to host relevant and appropriate candidates. The second part is a deeper dive into each host to identify specific candidates. At the same time, The Energists sometimes informs the mass market specifics on the search mandated via digital means such as posting the opportunity on its LinkedIn page. The techniques used in this stage are designed to achieve a balance of active and passive candidates. This stage runs continuously until the search is closed.

The specific activities are:

- A. Conduct extensive desk-based research to map the relevant organizational structure of each target company or government body within the geographic regions defined in the scope of the search.
- B. Conduct follow up research to identify profiles of matching candidates and reporting relationships within target organizations by:
 - (a) Querying Sources - utilize internal network through calls, emails, etc. to solicit candidate names on a discretionary basis. Find out who the movers and doers are within the target organizations.
 - (b) Utilizing internal proprietary database as well as research tools from subscription based third party software including: Talentis, LinkedIn, GatedTalent, and other similar professional platforms.
 - (c) Optional: Using online methods (website, LinkedIn, Domain Groups, LA City's portal with responses directed to The Energists, & other forums) informing the talent market of the active mandate with a view to soliciting direct engagement from active and opportunistic candidates. Note: while optional in general, we strongly recommend this method of attracting active candidates for government assignments as we have had good results using this method in the past.
- C. Compile a continuously updated “long list” of potential candidates
- D. Discuss the output of the initial research phase (ten to twenty candidates) with LA City at a face-to-face (video conference) meeting, during which LA City and The Energists will agree:
 - (a) The most appropriate targets from the population to pursue as priority target candidates.
 - (b) If any refinements, or adjustments, to the original specification are required.

D. Short List Generation – Target Date for Completion: 30-days from Start

Following agreement on the priority target candidate population, The Energists will:

- Confidentially approach the agreed target candidates to promote the opportunity and to establish an initial level of interest. At this stage we will aim to gain additional insight into each target candidate's background and experience prior to deciding whether to proceed further.



- Forward the position specification / “selling memorandum” to each selected target candidate, where interest is mutually confirmed, and follow up by means of telephone contact and discussion.
- Arrange for our recruitment consultant (and Partner, depending on level of search) to interview all interested parties worthy of consideration to assess their potential suitability. The initial interview is viewed by The Energists as an appraisal of the candidate’s track record, perceived strengths and weaknesses, personal background and overall ability to match the objectives of the appointment including our perception of their potential ‘fit’ into the business.
- Following our interview program, and for only those candidates who consent to having their details shared with LA City, present recommended candidates to LA City for further consideration.
- Note: The Energists takes candidate confidentiality very seriously and details provided by the firm may not be passed to a third party under any circumstances and we expect all our clients to maintain the highest degree of sensitivity and adhere to candidate confidentiality at all times. Similarly, the firm keeps abreast of regulatory changes including CCPA, GDPR etc and uses its business system (FileFinder) to govern compliance with the same as appropriate.

E. Enhanced Screening & Due Diligence – Duration: Five to Ten Days

References and Follow Up Interview

- A. Utilize our sources in the industry to glean additional insight into shortlisted candidates work history. Note: using official written references from candidate nominated referees alone does not form the basis of an “acid test”.
- B. Interview the candidate in person for a second time (currently mostly through video due to COVID) to follow up on any residual, or new, areas of concern and request educational and other qualification certificates for verification. This second interview is typically more formal, follows appropriate industry recognized techniques, and may include situational role playing and other aptitude testing depending on role requirements.

F. Priority Candidate Ranking – Duration: Five Days

Refine short list to highlight top three to five candidates, all compliant with the agreed specification but, often with different backgrounds, management styles and personalities, allowing the client to compare and contrast.

Once the short list is agreed with LA City - full candidate assessment to be submitted with accompanying resume to client as Candidate Profile, with explanation on how The Energists was introduced to the candidate and chronicling what has been discovered during due diligence with a summary on why we are presenting the candidate for the role along with areas that warrant further investigation and/or scrutiny.

This step will also output compensation & benefits expectations for each candidate.

G. Client Interviews– Target Date for Completion: 45 days from Start

Upon LA City’s acceptance of our candidate recommendations, The Energists will:

- Set up the program of interviews between LA City and the selected candidates and, where appropriate, facilitate via attendance by one of our Partners.

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- Following the interviews, communicate to LA City the reactions and continuing interest levels expressed by the candidate(s) selected for final consideration.
- Discuss with LA City whether to proceed with additional candidate evaluation techniques, such as psychometric / EQ evaluation.
- Arrange second or subsequent interviews with those selected for further evaluation; informing any candidates who have been eliminated following the interview program.

H. Offer and Negotiation – Duration: Five to Seven Days

The specifics of this part of the process are determined through client choice – some prefer The Energists to advise on compensation and benefits as well as present offer letters; others prefer to handle this stage themselves; sometimes it is a hybrid of both.

Should LA City decide they would prefer The Energists play a lead role in this step the firm will:

- Manage the process of negotiation to reach a mutually acceptable deal between LA City and the selected candidate.
- Manage the candidate through offer negotiation, acceptance, and planned resignation – a critical part of the process.
- Arrange for additional pre-employment FRCA compliant background checks, per LA City policy, to be performed – most clients prefer to conduct these themselves however, The Energists maintains a network of recommended vendors for this service and is comfortable managing the process as laid out in the RFQ.

Whatever the preferences, The Energists will guide and assist LA City throughout the process to close the search without undue risk and/or delay.

I. Exit and Onboarding – Duration: Fourteen Days

Remain engaged with the candidate and client to ensure that once a bi-lateral hiring decision has been made, it is closed. The critical item here is guarding against any attempt at an employer's counteroffer.

Targeting 60-days from search commencement to the new employee starting work. There are many variables that can extend this date. When it does extend it usually relates to hiring company or candidate workload/commitments (e.g. notice period from previous employer etc).

At this point The Energists will inform those candidates kept in consideration are informed that the opportunity has been closed and that they were unsuccessful.

J. Post Hire Check in

At 30, 90 and 120 days after the new hire is onboard, check with both the appointee and hiring manager to ensure a smooth transition is taking place.

BUDGET AND FEE SCHEDULE

Our proposed fee, based on professional services, will be thirty percent 30% of the first-year annual cash compensation consisting of base salary, sign on bonus and guaranteed annual bonus (if applicable) and will be payable as follows:

1. Upon execution of this agreement, a non-refundable initial retainer of 1/3 (one-third) of the estimated fee falls due;

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2. A second 1/3 retainer falls due the earliest of:
 - a. First offer of employment or;
 - b. 45 days from date of agreement; and
3. On the date the candidate begins employment, the balance of the fee falls due. The final invoice shall be adjusted should the annual compensation differ from the initial estimate above.

We do not anticipate any additional expenses other than candidate travel and accommodation, data screening (optional) if appropriate.

OTHER TERMS AND CONDITIONS

As laid out in our existing agreement with LA City.

We appreciate this opportunity to work with the City of Los Angeles. While we are an energy specialist boutique, we feel our processes, track record filling municipal and state level searches, and relevant functional competency (HR/Comp. & Ben.) of one of the assigned personnel, stands us in good stead to complete this engagement to your satisfaction.

Respectfully yours,

A handwritten signature in black ink, appearing to read "Jon Hill", written over a horizontal line.

Jon Hill
CEO
The Energists



PARTNERS IN DIVERSITY, INC.
A Small Business, Women Owned Enterprise

August 17th, 2022

Task Order Solicitation Response:

Titled - Executive Recruitment Services-Personnel Department
RAMPLA ID #200482

Especially prepared for: City of Los Angeles
700 East Temple Street, Rm 375
Los Angeles, CA 90012

Attention of: Ms. Jenny Yau, Chief Management Analyst
Personnel Department

Submitted by: Partners In Diversity, Inc.
690 East Green Street, #101
Pasadena, CA 91101
www.partnersindiversity.com

Primary Authorized Negotiator: Kate M. Harrington
Kate.Harrington@p-i-d.biz Office
Phone: (626)793-0020
Facsimile: (626) 793-0022
Cellular: (213) 215-0070

Secondary Negotiator: Arlene M. Apodaca
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Federal Tax Identification # 81-0555962
Contract # C-140216

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Executive Summary:

Established in 2002, Partners In Diversity is a staffing and recruiting firm focused on Executive and Difficult to fill placements. Partners In Diversity was founded by Kate Harrington and Arlene Apodaca, both are industry veterans with over 20 years of experience that you can trust. Our recruiting solutions include nationwide specialty sourcing and candidate selection across multiple industry structures consisting of Public Agency, Federal Agency, and Commercial businesses. We listen to our customers to gain a better understanding of what recruiting efforts should be implemented in order to deliver on the scope of work for a successful outcome.

Throughout our twenty-year history, our roots are established in Los Angeles with an experienced recruiting team providing a full range of employment solutions pertaining to Executive and Professional placements. The nature of our business requires us to align with our customers on a several key levels such as organizational culture, industry type, specific agency regulations, policies and occupational qualifications required to perform successfully in the role. Partners In Diversity fills a unique void requiring a high-level of due diligence, communication, and dependability. In attaining this task order, we understand that our position is to develop and implement a regional, statewide and nationwide executive recruitment in search of a Defined Contribution Plan Manager Manger to fill this role successfully for the Personnel Department. In listening to the City of Los Angeles; we understand what is required of key personnel how they play a role in performing successfully for the Los Angeles Personnel Department.

Partners In Diversity is registered in the LA BAVN portal (RAMPLA). Under our City of Los Angeles Business Enterprise Designation, we maintain our set aside status as a SBE, WBE and DBE business. We will employ all measures to attain the level of recruitment efforts necessary meet turnaround times for project deliverables and other scheduled activities once a Notice To Proceed is received. In our company history, we have delivered without project delays and have kept our commitments to our customers. Partners In Diversity is incorporated as an S Corp in the State of Nevada as of June 11th 2002, and doing business in the State of California.

Partners In Diversity highlights its disadvantaged small business (DBE and SBE) certification. On a Federal level, we are registered in BETA.SAM.gov as an EDWOSB (Economically Disadvantaged Women Owned Small Business). Our certifications include:

- County of Los Angeles' Office of Affirmative Compliance-Community Business Enterprise
- State of California, Department of General Services – Small Business
- Los Angeles County – Local SBE & CBE Certification
- DOT/California Unified Certification Program (CUCP) - DBE, SBE
- SBA/Small Business Administration Certificate of Competency
- Supplier Clearinghouse – CPUC Utility Supplier Diversity Program
- Women Business Enterprise National Council

- Metropolitan Water District. This certification is recognized by its reciprocating agencies LAUSD, the City of San Diego and the County of San Diego.

Financially, Partners In Diversity is a sound, credit worthy company associating itself with stable financial lending resources capable of supporting the efforts under this task order solicitation. A significant portion of recruitment costs involve items such as specialized advertising, job postings, subscriptions to media portals for recruiting, outreach on a national level, screening resources, candidate expense and overhead costs.

City National Bank is our banking resource with banking services in countries around the world. Philadelphia Indemnity Insurance Company is our General Liability provider and Arch is our Worker's Compensation carrier. Our business relationships provide the financial resources needed to support our efforts required for executive search recruitments. Partners In Diversity aligns itself with Rated "A" companies.

Lead Project Manager:

Kate Harrington is our proposed designated lead project manager and as the main point of contact, assumes the responsibilities within this search. Her qualifications include recruiting of professional placements, management and executive placements. She manages and implements recruiting agendas with direct involvement to ensure our placement is met seamlessly. Kate Harrington proactively employs national search and sourcing efforts for our recruitments.

Her contact information is as follows:

Kate M. Harrington, Project Manager, Authorized Negotiator/Signer and Recruiter:

Kate Harrington, Lead Project Manager
690 East Green Street, #101
Pasadena, CA 91101
Phone: (626) 793-0020; Cellular (213) 215-0070
Email: Kate.Harrington@p-i-d.biz

Partners In Diversity strives to provide a cost effective, efficient service that saves our customers time and money while mitigating employment risk, streamlining employment processes and adding value to their Agency.

Team Introduction and Experience:

Partners In Diversity's team possesses 60 years of collective recruitment experience and twelve (12) years working within a Public Agency environment. Our search provides for an innovative and experienced Defined Contribution Plan Manager pertaining to full-time and half-time employees administered by the Personnel Departments' Employee Benefits Division.

The Defined Contribution ("DC") Plan Manager is responsible for the overall management and oversight of the administrative, operational, contractual, supervisory, and communication functions. The Defined Contribution

Plan Manager resides in the City’s Personnel Department and acts as the DCP staff advisor to the City’s Board of Deferred Compensation Administration (“Board”).

Since our inception in 2002, our organizational strength is our people and the talent they contribute to our team. We have built a tenured industry staff and possess a data base of over 5,000 candidates and employees. Partners In Diversity is committed to the betterment and success of our clients, our employees, our vendors, and the communities that we serve. Our major organizational strengths are established internal key staff members and a well-defined business practice with excellent credentials.

Partners In Diversity offers the following:

- 1) A dedicated Lead Project Manager specifically focusing on this search.
- 2) A tenured support staff with between 15 - 20 years of company longevity and direct recruiting experience pertaining to Professional and Executive level placements.
- 3) Front and back office integrated software for search, retrieval and accurate reporting.
- 4) Focused recruiting efforts utilizing inclusive candidate searches and screening procedures.
- 5) Financial stability and established banking processes in place.
- 6) Affiliation with rated “A” vendor resources.
- 7) One Year Guarantee on our placement.

With 20 years of recruitment experience in a prime contractor role; we begin our deliverables meeting with the hiring department and other offices as requested. We will assist in the development and composition of a job brochure for publication. After the job brochure is finalized, we place the position on viable job boards and begin our passive recruitment. Our processes include proceeding with sourcing and outreach of qualified candidates, responding to all candidates that have interest in the position, scheduling interview times, screening (including professional reference verifications, education, criminal, and credentialing as needed), assisting with onboarding process, conducting orientations, assisting in travel arrangements, program monitoring and contract closeout. We have 20 years of experience and performance with executive and professional search options, payroll processing, long and short-term contingent contract opportunities, contract to hire and direct hire placements.

The following are some examples similar in size, scope and complexity of work, which we have performed successfully providing professional and executive placements.

The Los Angeles Metropolitan Transportation Authority is a premier Public Agency that delivers public transportation services throughout Los Angeles County. They are one of the region’s largest employers with over 10,000 employees and consultants. They plan transportation and drive transportation policy. There is significant growth and a need to hire executives with innovative visions in the public transportation sector. Kate Harrington delivers successfully on Executive level placements. Social Media platforms and trade publications are used as outreach and sourcing for this level of recruitment. Our placements include Director, Senior Director, Executive Officer, Senior Executive Officer and Deputy Executive Officer level roles.

The Greater Los Angeles Veteran’s Administration in Los Angeles, CA was in need of a Program Manager to lead their Medical Support Assistants (MSA) project. Our employee held responsibility for administering the MSA program and maintaining all oversight and reporting responsibilities of the program. Seven (7) VA locations reported to this position.

Task Order Solicitation Response

Executive Recruitment Services – Personnel Department

Granite Construction is a nationwide construction company that builds heavy infrastructure throughout the Country. Partners In Diversity provides on-going professional recruitment services for positions such as Quality Engineering for the military base in Twenty-Nine Palms, CA. Partners In Diversity's makes placements in the areas of engineering, preventive maintenance, administrative and analyst personnel for our client.

Technical Approach:

As described in the task order solicitation, the Defined Contribution ("DC") Plan Manager is responsible for management and oversight of the administrative, operational, contractual, supervisory, and communication functions of the DCP. The DC Plan Manager resides in the City's Personnel Department and acts as the DCP staff advisor to the City's Board of Deferred Compensation Administration ("Board"). The DC Plan Manager oversees, and is primarily responsible for ensuring that DCP staff support the Board in executing its fiduciary role for the DCP and the DCP's participants, which include performing the following core duties:

- Supervising a team of staff performing the administrative, engagement, reporting, and related operational functions of the DCP.
- Carrying out decisions and directives of the Board, including implementing policy and program directives.
- Procuring for and executing contracts for various administrative, investment, consultant, and other services.
- Directing contracted service providers.
- Providing analysis and policy recommendations regarding a variety of process, plan design, and administrative matters.
- Developing forward-thinking plan design and engagement initiatives to drive ongoing improvements in participant outcomes.

This position may further perform duties in connection with the City's Pension Savings Plan, a Social Security replacement plan established under Internal Revenue Code Sections 457/3121.

Partners In Diversity proposes one vendor to complete this task requirement. We are prepared to:

1. Meet and confer with the Personnel Department, the hiring department, and/or the Mayor's office throughout the entirety of the recruitment and hiring process. This may include written or oral progress reports at an interval dictated by the City or upon request by the Personnel Department or hiring department.
2. Meet and confer with the interested hiring department and any interested parties identified by the City, which may include but is not limited to, the Mayor's Office, Boards of Commissioners, City Council members, union representatives, etc., regarding the duties and responsibilities of the position, minimum qualifications, and evaluation criteria.
3. Develop and implement a regional, statewide and nationwide executive search, which *may* run concurrently with advertising of the position by the City of Los Angeles Personnel Department, utilizing a comprehensive marketing strategy to identify and attract the most qualified candidates from diverse backgrounds.
4. Develop and administer an evaluation and selection process of interested candidates, either on behalf of the City or in partnership, including an evaluation of candidates through application/resume review and/or

5. interview processes, and verification of professional and educational credentials, in order to identify the most qualified candidates.
6. Provide the City with documentation and support of selection and non-selection recommendations.

We may also be required to supply the following *optional services* to the City upon request:

Re-conduct an executive search to fill the position should the selected candidate(s) resign or be dismissed for cause from City employment within one year of their appointment.

All tasks, excluding optional services to be rendered upon request, will need to be completed to the satisfaction of the City within approximately 3 months of NTP execution. The City envisages filling the vacant position on or about October 1, 2022.

A key element to success in recruiting is an ability to understand the details of the requirement. This gives us the ability to deliver a successful placement. Our approach under this requirement is presented in a two-phases. Our approach is conducted in two phases.

Phase one consists of meeting with the hiring authorities, developing a position brochure, a candidate profile and recruitment strategy. A meeting with the hiring managers (conferring with the Personnel Department, Hiring department and/or possibly the Mayor’s office, Boards of Commissioners, City Council member and union representatives, etc.) will take place to evaluate the requirements of the position. A candidate profile is built with the level of required work experience, education, licenses, credentials, certifications, leadership skills, and compensation range that the City of Los Angeles designates. Recruitment activities are implemented, advertisements and position postings are placed. Tasks are divided within the following approach.

Phase One:

- Task 1 - Hold Key Stakeholder Meeting(s)
- Task 2 - Develop, review and finalize the search process schedule
- Task 3 - Develop a candidate profile and the recruitment strategy
- Task 4 - Advertisements, job postings are placed and outreach begins

Phase two of the recruitment process is delivering on a proactive and robust recruitment. We utilize our internal database and external outreach using media platforms, job boards and professional organizations to garner a diverse and qualified pool of candidates.

Phase Two:

- Task 1 - Identifying and outreach to qualified candidates.
- Task 2 - Tracking and responding to all candidates interested
- Task 3 - Resume review and screening interviews
- Task 4 - Forwarding candidate finalists to the City of Los Angeles for selection

Deliverables are intricate from the inception of a task order and the methods used in sourcing, recruiting and screening of viable candidates to the compliances of EEOC (Equal Employment Opportunity Commission), insurances, meeting timelines required in the Scope of Work services for the Hiring Manager, and the administration of the Task Order requirements.

Task Order Solicitation Response

Executive Recruitment Services – Personnel Department

To ensure the success of recruitment services pertaining to the Executive Recruitment of a Defined Contribution Plan Manager residing in the Personnel Department; we will identify 3 to 5 desirable and qualified candidates to present for this role. This recruitment requires a 90-day turnaround timeframe from the NTP to the presentation of qualified candidates to the City of Los Angeles for consideration. We believe that the work under this task mandates a focused and concentrated approach to maintain a streamlined and efficient level of communication pertaining to sourcing of candidates in this role. In awarding this task, perhaps the City of Los Angeles will allow the vendor to be featured on their job board or career site. We believe this will capture an even greater audience for this role and help to maintain a streamlined approach.

If selected for this task award, Partners In Diversity is capable of successfully performing as a prime contractor.

Partners In Diversity utilizes a variety of methods for recruitment purposes for diverse activity. Recruiting efforts are established to provide the City of Los Angeles with the best candidates available in the marketplace. Some of our methods include:

- ✓ Utilization and Outreach on Social Media Websites.
- ✓ Posting positions on Partners In Diversity's Website.
- ✓ Customized Local and National advertising.
- ✓ Outreach to Veteran's organizations, Veteran's with Disabilities.
- ✓ College and Trade School outreach.
- ✓ Employee, Customer, Instructor referrals.
- ✓ Resume and Specialized Searches through resume Data Bases, Job Boards and Local Community Agencies.
- ✓ Professional Organizations and Referrals.

Prior to placement, potential candidates undergo a pre-screening evaluation to ensure that the City of Los Angeles receives the most qualified candidate selection for conducting an engaging interview session and proper placement for the position.

Partners In Diversity provides cover letters, resumes, candidate summary profiles, and professional reference checks along with other pertinent information on selected candidates. Methods currently used to ensure proper placement of all candidates include:

- a. Initial contact - Partners In Diversity evaluates the type of work sought and general background information of our candidate.
- b. Resume and profile review - Review of our candidate's qualifications determining a progressive career path and their level of experience, education, salary requirements, determining the overall ability to perform successfully in the position.
- c. Candidate interview - Thorough interviews are conducted in person, by phone or webcam. A candidate's work experience, ethic, flexibility, and ability to communicate are assessed while asking interview

questions to determine a candidate’s experience, career goals and if they align with the responsibilities of the position and the culture of the organization. Partners In Diversity interviews all applicants in compliance with the Americans with Disabilities Act and adheres to Equal Employment Opportunity with all candidates.

- d. Skills Evaluation - Every candidate is referenced for their specific experience and accomplishments. Certain criteria must be met in order to pursue the position and have qualifications presented. Successful candidates whose skills and experience meet with the requirement are then selected.
- e. Professional Reference/Employment Verification - Thorough referencing is performed on every qualified candidate. This is an important component in evaluating qualifications. We verify the details of our candidates such as their accomplishments and their leadership style.

Partners In Diversity honors and will comply with the one-year guarantee. Should our appointed candidate come to an end before the completion of the first year of service due to resignation or dismissal, we will provide the City of Los Angeles with a replacement at no cost. This guarantee does not apply to situations in which a candidate is promoted or re-assigned within the organization.

Team Identification:

If awarded, the Partners In Diversity’s team assigned to this project are Kate Harrington and the support staff. Our support staff will include Diana Baca for background screens and Anna Emerald for social media postings and identifying additional personnel if needed. Partners In Diversity is successfully capable and seeks to perform in a prime contractor capacity utilizing no subcontractors.

Budget and Fee Schedule:

Partners In Diversity is proposing its offer under NAICS Code: 561312 Executive Search Services. Partners In Diversity understands that the City of Los Angeles wishes to engage the services of a Professional Services consultant to conduct Executive Recruitment Services - Personnel Department pertaining to a Defined Contribution Plan Manager search placement.

Should Partners In Diversity receive a Notice To Proceed; we will begin our task immediately to demonstrate outstanding delivery within the Scope of Services and promote a seamless process.

Within the Full Recruitment cycle, we are proposing the following schedule and hours. Full Recruitments are completed within 90 working days of the agreed upon schedule. We are proposing our fee base with fully burdened rates.

Included in our deliverables for Full Recruitments consist of 720 hours of recruitment services:

- 1st/2nd Day - Meet the City of Los Angeles’ Hiring Manager, and key personnel to gain a thorough understanding of the department and the position. We adhere to all EEO requirements in the process.
- 3rd-7th Day - Clarify objectives to ensure that the task and occupational description are fully understood. Develop a candidate brochure and interview questions with the Hiring Manager and Department. Once approved we proceed with job postings and outreach.

8th-60th Day - Conduct passive outreach and receive candidates through on-line advertisements and trade publications with national channels assisted by creating and posting job advertisements. Conduct passive outreach through social media portals.

61st-80th Day - Evaluate and submit 3 to 5 candidates for selection and schedule interviews with the best qualified applicants. Interviews can be completed in person, phone or webcam meetings with final interviews to follow.

81st-90th Day - Schedule final interviews. Provide a candidate interview binder with a written summary of their education, experiences and strengths as it relates to the position requirements. This will consist of:

- a. Resume and other important information
- b. Candidate experience and significant achievements relative to the position.
- c. Education and background. Personal strengths and weaknesses with respect to the position.
- d. Level of interest in the position and perceived organizational fit.
- e. Remuneration and financial expectations.
- f. Complete an extensive review of the candidate qualifications.
- g. Notifications to candidates. List candidates that are not selected and reasons why.

Once the Hiring Manager and Personnel Department make a selection of their preferred candidate; Partners In Diversity may continue to assist in compensation negotiations if requested. The total recruitment proposed is 90 days or 720 hours of recruitment services.

Recruitment Fee Schedule

Partners In Diversity proposes a 23% placement fee of the employee's annual base salary. Our fee is invoiced and guarantees begin the day the employee commences employment with the City of Los Angeles.

Within our fee schedule, we are proposing a not to exceed \$2,000.00 travel allowance *subject* to the approval of the City of Los Angeles for interview expenses such as airfare and hotel accommodations. If approved these items are passed through costs with no additional fees.

Placement fees are billed upon delivery and can be invoiced with an option of three (3) equal installments invoiced within three consecutive months from the date of hire if requested.

Our Executive Recruitment Service include a twelve (12) month (calendar day) replacement guarantee from the date of hire by the City of Los Angeles. Should our placement terminate for cause or reason within a twelve (12) month period; Partners In Diversity will replace the position at no additional placement fee with only a pass thru on expenses or prorate the original placement fee. Should Partners In Diversity not identify a satisfactory replacement then we propose the following:

Should an employee leave within 0 days up to 90 calendar days, the reimbursement is 75% of the original placement fee.

Should an employee leave within 91 up to 180 calendar days, the reimbursement is 50% of the original placement fee.

Should an employee leave within 181 up to 365 calendar days, we propose a reimbursement is 25% of the original placement fee.

Thank you for allowing Partners In Diversity the opportunity to submit our qualifications to the City of Los Angeles for consideration pertaining to the Task Order Solicitation for “Executive Recruitment Services - Personnel Department.”

Partners In Diversity is an equal employment opportunity employer. “Partners In Diversity, Inc. recruits and hires qualified candidates without regard to race, religion, color, sex, sexual orientation, age, national origin, ancestry, citizenship, veteran, or disability status, or any factor prohibited by law and as such affirms in policy and practice to support and promote the concept of equal employment opportunity and affirmative action in accordance with all applicable federal, state and municipal laws.”