



**Chief Investment Officer
City of San José Boards of Administration
of the Police and Fire Department
Retirement Plan and the Federated City
Employees' Retirement System**


ALLIANCE
RESOURCE CONSULTING LLC



September 24, 2025

VIA EMAIL

Ms. Sarah Steele
Senior Executive Analyst
City Manager's Office of Employee Relations
City of San José
200 East Santa Clara Street, Wing 3rd floor
San José, CA 95113

Dear Ms. Steele:

Alliance Resource Consulting is pleased to present this proposal to assist the City of San José Boards of Administration of the Police and Fire Department Retirement Plan and the Federated City Employees' Retirement System in recruiting its next Chief Investment Officer. We understand the high stakes of this hire and are committed to making your job easier by delivering a seamless, client-centered process that identifies exceptional leadership talent. Our team will manage the details, reduce the burden on your staff, and ensure you meet your timeline with confidence.

With a proven track record of over 800 executive placements nationwide and deep expertise in public sector leadership, Alliance stands apart through its highly personalized, client-centered approach. We both have direct experience placing key aviation executives with your organization. From strategy development to final negotiations, our recruitment team will provide you with continuous support, transparent communication, and access to cutting-edge recruitment tools. Our commitment to diversity, professionalism, and exceptional service ensures that you will meet your timeline and hiring goals with confidence.

Why Alliance Stands Apart

Alliance Resource Consulting delivers a level of partnership and responsiveness that sets us apart in the executive search industry. Unlike larger firms that may rely on formulaic processes, we provide a boutique, customized approach where every client receives executive-level attention and hands-on support. We go beyond advertising, proactively identifying and engaging top-tier, diverse candidates — including those not actively seeking new roles. Our streamlined technology platform, paired with frequent, transparent communication, makes the search process easier for our clients while enhancing the candidate experience. With Alliance, you're not just hiring a search firm — you're gaining a dedicated partner committed to your success.

Sincerely,

A handwritten signature in black ink, appearing to read "Sherrill Uyeda".

Sherrill Uyeda
Founding Partner

A handwritten signature in black ink, appearing to read "Wesley Herman".

Wesley Herman
Regional Director, West Coast

About Us / Firm Qualifications

A team of professionals dedicated to helping you find talented candidates who embrace your organizational culture

Since 2004, Alliance Resource Consulting has earned a reputation for delivering high-touch, high-quality executive search services tailored to each client's unique needs. As a minority- and female-owned firm, we bring proven success in achieving diversity goals, and our track record includes over 800 successful placements nationwide.

We are based out of La Palma, California, and have consultants in Orange County, Los Angeles, Los Altos and Sacramento, California; and Tallahassee, Florida.

What sets us apart:

- ▶ **Proactive, multilayered search:** We don't just post ads — we actively identify and engage top-tier candidates.
- ▶ **White-glove service:** Two dedicated consultants ensure constant communication, rapid responsiveness, and personalized attention.
- ▶ **Technology-enabled ease:** Our streamlined application portal and real-time client dashboard simplify your work and keep you informed.
- ▶ **Respect and professionalism:** We treat clients and candidates with the utmost care, enhancing your organization's reputation in the market.
- ▶ **On-time, on-budget delivery:** We take full ownership of the process, so you can focus on your priorities while we deliver exceptional results.

Our Current Staffing

Sherrill Uyeda
Founding Partner

Wesley Herman
Regional Director, West Coast

David McDonald
Regional Director, East Coast

Syldy Tom
Director, Southern California

Rick Armendariz
Senior Executive Recruiter &
Career Coach

Sheryl Stewart
Senior Consultant

Rich Kaplan
Senior Consultant

Linda Kann
Director of Administration

**Don't leave leadership to chance —
trust us to deliver the perfect executive
match for your organization.**

Our Experience

With a proven track record of over 800 executive placements nationwide and deep expertise in public sector leadership, Alliance stands apart through its highly personalized, client-centered approach. We have extensive nationwide experience recruiting well-qualified individuals for government agencies and special districts. We have placed excellent people with diverse backgrounds in organizations large and small.

We always deliver on time and within budget, and we take great care to preserve our client's confidentiality before, during, and after the recruitment process.

Past Relevant Placements

- ▶ Chief Investment Officer - Employees' Retirement Fund of the City of Dallas, TX (2025)
- ▶ Chief of Member Services - San Bernardino County Employees' Retirement Association, CA (2024)
- ▶ Chief Executive Officer, Office of Retirement Services - City of San José, CA (2024)
- ▶ Deputy Chief Legal Officer/Senior Deputy Chief Legal Officer - Kern County Employees' Retirement Association, CA (2024)
- ▶ Executive Director - San Luis Obispo County Pension Trust, CA (2023)
- ▶ Information Security Officer - Los Angeles County Employees Retirement Association, CA (2023)
- ▶ Chief, Information Technology - Los Angeles County Employees Retirement Association, CA (2023)
- ▶ Chief Retirement Investment Officer - Merced County Employees' Retirement Association, CA (2023)
- ▶ Assistant Retirement Administrator - Marin County Employees' Retirement Association, CA (2023)
- ▶ Executive Director - Stanislaus County Employees' Retirement Association, CA (2022)
- ▶ Assistant Chief Executive Officer, Benefits - Alameda County Employees' Retirement Association, CA (2022)
- ▶ Assistant Chief Executive Officer - Alameda County Employees' Retirement Association, CA (2022)
- ▶ Assistant Chief Executive Officer/Chief Legal Counsel - Sonoma County Employees' Retirement Association, CA (2022)
- ▶ Chief Operations Officer - Sacramento County Employees' Retirement System, CA (2021)
- ▶ Assistant Executive Officer for Administration - Los Angeles County Employees Retirement Association, CA (2021)
- ▶ Deputy Chief Executive Officer - Los Angeles County Employees Retirement Association, CA (2021)
- ▶ Chief Executive Officer - San Diego County Employees Retirement Association, CA (2021)
- ▶ Assistant Retirement Administrator - Fresno County Employees' Retirement Association, CA (2020)
- ▶ Executive Director - Mendocino County Employees Retirement Association, CA (2020)
- ▶ Investment Officer - San Bernardino County Employees' Retirement Association, CA (2020)
- ▶ Chief Counsel - Alameda County Employees' Retirement Association, CA (2020)
- ▶ Chief Executive Officer - Los Angeles County Employees Retirement Association, CA (2019)
- ▶ Staff Counsel - San Bernardino County Employees' Retirement Association, CA (2019)
- ▶ Chief of Member Services - San Bernardino County Employees' Retirement Association, CA (2019)
- ▶ Chief Financial Officer - San Bernardino County Employees' Retirement Association, CA (2018)

Recruitment Methodology & Approach

We approach every search as a trusted extension of your team. Our goal is to handle the complexity, minimize your workload, and deliver a slate of well-vetted, highly qualified candidates.

- ▶ **Deep discovery:** We invest time upfront to understand your organization's culture, values, and strategic priorities.
- ▶ **Aggressive outreach:** Beyond traditional advertising, we directly approach passive candidates and leverage our national network.
- ▶ **Candidate care:** We prepare candidates thoroughly, helping them put their best foot forward while ensuring their experience with your organization is professional and positive.
- ▶ **Hands-on support:** From interview coordination to background checks and negotiations, we stand beside you every step of the way.

We act as an extension of your organization

Our recruitment approach includes:

1 Strategy Development	2 Active Recruitment	3 Candidate Evaluation & Progress Report Meeting	4 Interviews & Final Reports	5 Background Checks & Negotiations
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Strategy Development

We will interview members of the Search Committee and other client contacts to obtain a detailed understanding of the position, key goals and challenges, and organizational culture. Then we will summarize our findings and submit a Recruitment Profile to you for approval. Once approved, the Recruitment Profile will be sent to potential candidates with authorized information about the organization and the position.

Active Recruitment

Once you have approved the Recruitment Profile, we will actively seek out individuals who meet your expectations.

Our hands-on approach ensures successful outcomes

We will place advertisements in professional journals and online sites because, even today, ads can be an effective means of attracting quality applicants. However, our experience has proven that extra work is often needed to attract the most competitive candidates — they must be sought out and encouraged to explore new opportunities.

To generate a high level of interest in your organization and the position you want to fill, we will conduct thorough research to identify a strong bench of prospective candidates. Then we will reach out to each of them individually via mail, email, social media, and telephone to promote the job and answer any questions they may have. As the application deadline approaches, we will do a final round of follow-up to our target list of candidates to inspire them to pursue the opportunity.

As a matter of corporate policy, we do not discriminate against any applicant on the basis of race, religion, creed, age, color, marital status, sex, sexual identity, gender preference, disability, medical condition, veteran status, or national origin.

Candidate Evaluation & Progress Report Meeting

We will review, acknowledge, and evaluate all applications received. We will conduct screening interviews with the most promising candidates. We will complete article and social media checks. When we have completed our candidate evaluation, which is typically a week after the resume deadline, we will send you a progress report that includes the leading candidates' application materials. Then we will schedule a meeting with you to walk through the progress report. The purpose here is two-fold: One, you will have the opportunity to review the candidates and select the individuals you would like to interview. Two, we have a chance to learn how your thoughts about the ideal candidate may have evolved during the recruitment process.

Interviews & Final Reports

► Candidate Fit and Interview Readiness

To support a smooth and effective interview process, we conduct readiness sessions with shortlisted candidates. These sessions help us further assess each candidate's alignment with your agency's priorities, culture, and the ideal qualifications for the role. At the same time, they ensure candidates are professionally prepared to clearly present their experience and fit, enabling your interview panel to make well-informed, side-by-side evaluations. These sessions are not coaching, and we intentionally do not share or discuss your interview questions to preserve the integrity and objectivity of your recruitment process.

► Preliminary Interview & Final Reports

We will schedule the candidates for preliminary interviews with your organization. You will be responsible for identifying and confirming the availability of the interview panelists. When all the candidates' interview times have been confirmed, we will send confidential final reports to the interview panelists so they can familiarize themselves with the candidates' qualifications before the interviews. Interviews can be conducted on-site or virtually. Either way, we will be present on the day of to facilitate the process from start to finish.

► Final Interviews

Follow-up interviews with shortlisted candidates can be scheduled directly by your team, or we're happy to coordinate this step on your behalf upon request.

Background Checks & Negotiations

► Background Checks

In the interest of providing as complete a picture as possible of your top candidate, Alliance will partner with reputable, reliable outside companies who specialize in completing education verifications and conducting civil, criminal, motor vehicle record, and credit checks. In addition, our in-house team will complete 360-degree (supervisor, peer, and subordinate) reference checks for your top candidate. The findings of these efforts will be presented to you in two separate, confidential reports and no extra charge.

► Negotiations

As a final step in the recruitment process, we will support you as you negotiate with your top candidate. The goal will be to develop an employment agreement that is acceptable to all parties which creates a solid foundation for future success.

Your Role

As our client, you have a very important role in the recruitment process. While we may identify and recommend qualified candidates, it is you and your organization who must decide which candidate to hire.

To ensure that we are able to provide you with quality candidates, we ask that you:

- ▶ Be clear about the qualifications and characteristics you are seeking in the ideal candidate.
- ▶ Advise us about any information you would like to keep confidential (e.g., privileged information).
- ▶ Provide feedback on the information and recommendations we make.
- ▶ Act swiftly with promising candidates. To ensure that your top candidates are not lost to other organizations, we encourage you to schedule interviews within two to three weeks of the application deadline, follow up with the leading candidates immediately after their interviews, and begin negotiations as soon as you have determined who is your top candidate.
- ▶ Share complete and honest information about your organization and the employment opportunity with the leading candidates so they feel confident that joining your organization will be the right career move for them.
- ▶ Maintain confidentiality (while respecting relevant state laws about open disclosure) to protect the integrity of the recruitment process and to ensure that none of the candidates' current jobs are put at risk.

By doing your part, you will maximize the likelihood of mutual success.

Projected Timeline

We are happy to adjust this timeline to align with your needs and priorities.

Week 1	Meet with key stakeholders to gather insights and background on the role.
Week 2-3	Develop and obtain approval for the Recruitment Profile. Develop a list of potential candidates to target. Prepare and place advertisements, if desired.
Week 4-7	Launch active recruitment — identify, engage, and cultivate top candidates for the position.
Week 8-9	Evaluate resumes and gather supplemental information. Submit progress report and meet to review leading candidates.
Week 10	Conduct interviews with the most qualified candidates.
Week 11	Deliver the final report and coordinate the client interview process.
Following Interviews	Verify degrees and certifications of the top candidate. Check references and conduct criminal litigation, civil litigation, motor vehicle record and, if appropriate for the position, credit checks. Assist with negotiations.

Competitive Advantage

Unlike larger firms that may rely heavily on advertising or transactional processes, Alliance offers a boutique, client-centered approach with an emphasis on customization, flexibility, and responsiveness. Our firm's leadership stays directly involved in every engagement, ensuring you receive executive-level attention and expert judgment throughout the process. Our cutting-edge technology, paired with a deep commitment to diversity and client satisfaction, enables us to deliver results that consistently exceed client expectations.

At Alliance Resource Consulting, we offer our clients exclusive access to a secure online portal where they can easily review candidate resumes, cover letters, and supplemental materials in real time. Unlike many firms that rely on email exchanges and static documents, our modern platform streamlines the candidate review process and enhances communication with your hiring team. This added transparency and efficiency is a key advantage of partnering with Alliance — giving you greater control, quicker access to information, and a smoother, more responsive recruitment experience.

Recruitment Costs

Transparent, Value-Driven Pricing

Our fee for this executive search is a fixed amount of \$37,000, which includes:

- ▶ Comprehensive search services, from strategy development to final candidate selection
- ▶ Up to **three** key meetings (via virtual or in-person): Recruitment Profile development, Progress Report presentation, and first-round interview facilitation
- ▶ Full candidate outreach, vetting, and reporting
- ▶ Background checks and negotiation support at no additional professional charge

Additional in-person meetings, if requested, are available at \$2,000 per meeting. Candidate travel reimbursements, if applicable, are handled directly by the client.

Billing Schedule

1st Billing	Due after start meeting	\$12,333
2nd Billing	Due after progress report delivery	\$12,333
3rd Billing	Due after interviews are complete	\$12,334

We are happy to adjust the billing schedule to meet your administrative needs. With Alliance, you benefit from transparent pricing, no hidden fees, and a process designed to deliver **maximum value**.

Cancellation / Discontinuation Clause

Flexibility and Client Control

We understand that priorities can shift, and you retain full flexibility to discontinue the search at any point. Should you choose to cancel the assignment, you will only be billed for services performed and expenses incurred up to the date of cancellation:

- ▶ Within the first 30 days, one-third of the professional fee is due.
- ▶ After 30 days, the remaining fee is prorated based on time elapsed.
- ▶ After 90 days, the full professional fee is due.

Additionally, if you hire — within one year — any candidates introduced during our search process for a position other than the original role, a **reduced placement fee of \$10,000 per hire** will apply.

Our goal is to provide you flexibility and fairness, while ensuring transparency in our partnership.

Our Commitment to Your Success

We stand fully behind the quality of our work and the success of the leaders we help you hire. If the selected candidate (recommended by us for hire and excluding internal candidates) leaves for any reason within one year of their start date, Alliance Resource Consulting will conduct a replacement search at **no additional cost**.

Our goal is not just to fill a position — it's to ensure you have the right leader in place for the long term. This commitment reflects our confidence in our process and our dedication to your satisfaction and success.

Alliance Summary

At Alliance Resource Consulting, we don't just deliver candidates — we deliver peace of mind. Our team is ready to partner with the City of San José Boards of Administration of the Police and Fire Department Retirement Plan and the Federated City Employees' Retirement System to ensure a seamless, efficient, and highly successful Chief Investment Officer search. We look forward to bringing you exceptional service, trusted guidance, and a results-driven process that makes your job easier and secures the leadership your community deserves.

Contact Information

Alliance Resource Consulting

Headquarters

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La Palma, CA 90623

Website: www.alliancerc.com

LinkedIn: <https://www.linkedin.com/company/alliance-resource-consulting>

Sherrill Uyeda

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Wesley Herman

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References

Employees' Retirement Fund of the City of Dallas, TX

Name: David Etheridge

Title: Executive Director

Phone #: (214) 580-7700

Email: detheridge@dallaserf.org

Marin County Employees' Retirement Association

Name: Jeff Wickman

Title: Retirement Administrator

Phone #: (415) 473-3733

Email: jwickman@marincounty.org

Biographies

Sherrill Uyeda Founding Partner

Sherrill has over twenty-five years of public sector executive search experience. She began her career in executive search in 1998 and from 1999 to 2004, Sherrill was an executive search consultant with MAXIMUS, a leading government consulting firm which assists state, federal and local governments. In 2004, along with Eric J. Middleton, she founded Alliance Resource Consulting LLC.

Since 2007, Sherrill has been instrumental in expanding the organization's presence in the Silicon Valley, Tampa (FL) and Sacramento (CA). She fosters an environment of frequent communication to both clients and candidates as well as ensuring transparent and ethical recruitments on a timely basis. Her leadership and collaborative skills have led to an impressive hiring and retention rate.

Sherrill's track record of recruiting high-profile government executives across the nation in various industries include: city and county management, transportation, utilities, human resources, library services, building and planning, economic development and pension and retirement systems. Past clients for nationwide recruitments have included the City/County of San Francisco (CA), the County of Los Angeles (CA), Arlington County (VA), Broward County (FL), the City of Atlanta (GA), the City of Alexandria (VA), the City of Boston (MA), the City of Dallas (TX), and the City of San José (CA). Past retirement systems, she has recruited for are: Contra Costa County Employees Retirement Association, Fresno County Employees Retirement Association, Kern County Employees Retirement Association, Marin County Employees Retirement Association, Santa Barbara County Employees Retirement System, and Sonoma County Employees Retirement Association.

Additional areas of expertise include: facilitating community forums and outreach meetings, conducting multi-lingual citizen surveys and compensation and benefits negotiations.

Sherrill graduated from the University of Southern California, with both a Bachelor of Arts degree in Communication Arts and Sciences and a Master of Public Administration degree. She is a member of USC's Town and Gown and the Society for Human Resources Management.

Wesley Herman Regional Director, West Coast

Wes is an accomplished executive recruiter specializing in local government placements, with extensive experience in law enforcement, public sector management, and private sector leadership. With more than 16 years of leadership in municipal policing in Northern California, he has spearheaded strategic initiatives and personnel selection to bolster public safety and operational excellence. His career includes launching specialized units, fostering public-private partnerships, and leveraging technology to advance policing practices, all while managing high-profile initiatives and diverse teams.

Before transitioning into law enforcement, Wes spent over a decade in the private sector, leading approximately 100 executive, department head, and technical recruitments for local governments on the West Coast. His ability to identify and align talent with organizational needs has helped his clients build strong, effective leadership teams. Wes' deep understanding of public sector challenges and needs, coupled with his extensive network and relationship-building skills, has positioned him as a reliable partner who can navigate complex organizational landscapes and connect clients with exceptional leadership talent.

Wes holds a Master of Science in Law Enforcement and Public Safety Leadership from the University of San Diego and a Bachelor of Science in Economics and Business Administration from Saint Mary's College of California. His forward-thinking approach and dedication to impactful public sector solutions make him a trusted partner in advancing the leadership and effectiveness of local government.