



RECRUITMENT SERVICES



CHIEF INVESTMENT OFFICER

SEPTEMBER 30, 2025

TABLE OF CONTENTS

SUBJECT	PAGE
I. COVER LETTER	1 – 2
II. BACKGROUND/QUALIFICATIONS	3 – 10
III. GUARANTEE	11
IV. ORGANIZATIONAL CHART	11
V. WBCP KEY STAFF	12 – 14
VI. RECRUITMENT STRATEGY / PHASES	15 – 16
VII. SCOPE OF WORK	17
VIII. RECRUITMENT TIMELINE	18
IX. REFERENCES	19
X. MARKETING MATERIAL EXAMPLES	19
XI. COST SHEET/TIMELINE POLICY	20
XII. OTHER	21

I. COVER LETTER.....

SEPTEMBER 30, 2025

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



RE: City of San José Boards of Administration of the Police and Fire Department Retirement Plan and the Federated City Employees' Retirement System – Chief Investment Officer Recruiting Services

It is our pleasure to submit this proposal for recruitment services to secure your ideal candidate to serve as the Chief Investment Officer of the City of San José Boards of Administration of the Police and Fire Department Retirement Plan and the Federated City Employees' Retirement System. **WBCP has worked on many similar recruitments, and we look forward to the opportunity to partner with your organization on this critical position!**

We trust our proposal will showcase our client-focused recruitment process and will act as a testament that we are passionate about what we do to make our clients happy.

WBCP, Inc. was selected, through a national request for proposal process, as the single-awarded vendor for executive recruitment services through a national competitive process conducted by the National Association of Counties (NACo) under the Public Promise Procurement (PPP) program. This cooperative purchasing agreement, with San Diego County serving as the Lead Public Agency (LPA), allows public sector organizations across the U.S. to satisfy competitive procurement requirements and contract directly with WBCP—without the delays or added costs of a traditional RFP process. The PPP/LPA partnership ensures that organizations can engage WBCP quickly, compliantly, and with confidence in the value and quality of service delivered. **Learn more here:** <https://wbcpinc.com/naco>.

It has been proven that great employees are looking for great employers, not just a paycheck. WBCP provides a broader perspective to recruitment services – going beyond securing the ideal candidate – we brand your organization as an employer of choice. We use eye-catching marketing materials, innovative search practices, and responsive and respectful communications with your applicants and stakeholders. **Additionally, we guarantee this placement for 12 months, and we provide a fair and equal recruitment process that also focuses on attracting ethnic and gender-diverse applicant pools.**

WBCP is talented at working with you to identify the strengths, challenges, and opportunities of this job, the ideal candidate, and your community and organizational culture. WBCP will work with your stakeholders to design a recruitment strategy that will include a customized engagement process. We will have a series of meetings, discussions, stakeholder interviews, and survey(s) to get to know you, the organization, the community, the culture, and the staff whom the future Chief Investment Officer will lead.

My team and I know the California candidate marketplace and have many clients in your region, such as **Valley Water (Santa Clara Valley Water District), City of Palo Alto, City of Milpitas, County of Santa Clara, County of Alameda, County of Stanislaus, County of Merced, and County of San Mateo (just to name a few)**. We have exceptional experience successfully recruiting for similar positions, with several recent notable recruitments including, but not limited to:

- Finance Director, City of Sacramento, Sacramento, CA
- Finance Director, County of Marin, San Rafael, CA
- Finance Director, Tuolumne Utilities District, Sonora, CA
- Financial Services Director, Port of San Diego, San Diego, CA

To see a full list of our clients and successful recruitments, visit: <https://tinyurl.com/8vjkk7w3>

We have over two decades of experience in public sector executive search services and have provided direct search services through WBCP since 2004. WBCP's executive recruiters are all highly personable and have unique backgrounds that make them well-equipped to take on your recruitments, as you will read their biographies in this proposal. WBCP now has offices in California, Oregon, Washington, Texas, and North Carolina.

Confidential

I. COVER LETTER.....

Recruiting top talent has become the number-one topic among administrators. New and innovative recruitment strategies are critical to identifying and securing candidates with a deep understanding of how to assess and meet community needs and address future challenges. WBCP understands the complexity of community leadership, and we are prepared to provide a thorough, complete, and fair recruitment process to provide a diverse applicant pool. **Upon our 2024 year-end review, we found that over the last three years 63% of our placed candidates came from diverse backgrounds.** In fact, we are often selected and told that we bring a larger, more qualified and diverse groups of candidates than they have ever received from past professional recruiters.

Clients also choose our firm over others because of our ability to work with your support staff and stakeholder group (including boards, appointed/elected officials, and engaged constituents), manage all details of a recruitment process, and secure great candidates. Our dedication and commitment to the client are complemented by our deep understanding and ability to effectively navigate challenging political climates.

Our clients have great things to say about the quality of the service we provide and the amazing candidates we find them, In fact, many of our clients are return customers. Please feel comfortable reaching out to these organizations to get their feedback directly.

Lastly, we love what we do, and we are passionate about finding exceptional candidates who are also passionate about serving others. WBCP's staff are driven and desire to exceed client expectations. I appreciate your consideration in retaining our services and hope to have an opportunity to work with you in the future.

Best Regards,



Wendi Brown | Founder/President, WBCP, INC.
wendi@wbcpinc.com | 541-664-0376
www.wbcpinc.com

DIVERSITY

63%

*of WBCP candidates
placed in positions
come from a diverse
background*

II. BACKGROUND & QUALIFICATIONS.....

Principal: Wendi Brown, President/CEO

Company Legal Name: WBCP, Inc. (W. Brown Creative Partners)

Tax ID: 81-5454037

Website: www.wbcpinc.com

Phone: 866-929-WBCP (9227) / 541-664-0376

Address:

- **Oregon (3 offices including WBCP, Inc. Headquarters):** 213 E Main St., Rogue River, OR, 97537; City of Grants Pass and City of Tigard
- **California (5 offices):** San Jose, Gilroy, Roseville, Los Angeles and Santa Barbara
- **Washington:** City of Seattle
- **Texas:** City of Dallas



WOMEN OWNED

WBCP is a 100% women-owned business, an S Corporation, not part of a parent company, and is a registered small business through the US Small Business Administration (SBA). WBCP is registered to do business in all states we serve, and files and pays California S Corporation and personal income tax to the State of California.

BUSINESS HISTORY

WBCP, Inc. has been in business since 2004, and serves nonprofit and public sector organizations. WBCP offers a variety of services, including: partial and full service search services for individual contributor, supervisor, management and executive management positions; human resources consulting: organizational development, training, classification and compensation studies, analysis and assessments, etc.

II. BACKGROUND QUALIFICATIONS.....

WBCP has over 20 years of experience providing search services for public sector and non-profit organizations. We have successfully secured professionals and provided other consulting services in **California, Arizona, Colorado, Idaho, Nevada, New York, Oregon, Texas, Utah, and Washington.**

CITIES & TOWNS

California

- Anaheim
- Arcata
- Atwater
- Berkeley
- Calistoga
- Ceres
- Colfax
- Corte Madera
- Culver City
- Davis
- Dunsmuir
- Encinitas
- Fremont
- Fresno

- Gilroy
- Goleta
- Hemet
- Irvine
- Laguna Beach
- Larkspur
- Lincoln
- Livermore
- Livingston
- Long Beach
- Milpitas
- Napa
- Novato
- Oakland

- Orinda
- Oxnard
- Palo Alto
- Pasadena
- Petaluma
- Pismo Beach
- Port Hueneme
- Portola Valley
- Redding
- Riverside
- Rocklin
- Roseville
- Sacramento
- San Francisco
- San Rafael

- San Jose
- Santa Maria
- Santa Monica
- Santa Paula
- Santa Rosa
- Solvang
- Sonoma
- South Pasadena
- Sutter Creek
- Truckee
- Ventura
- Vernon
- Victorville
- West Hollywood
- Windsor

Oregon

- Astoria
- Ashland
- Central Point
- Garibaldi
- Gold Hill
- Grants Pass

- Hubbard
- Independence
- Phoenix
- Rogue River
- Talent
- Tillamook

Arizona

- Chandler
- Phoenix

Nevada

- Boulder City

New York

- Rochester

Texas

- Fort Worth

Utah

- Park City

Washington

- Duvall



COUNTIES

California

- Alameda
- Colusa
- Contra Costa
- Del Norte
- Fresno
- Humboldt
- Lake
- Los Angeles
- Marin
- Mariposa
- Mendocino
- Merced
- Mono

- Napa
- Nevada
- Orange
- Placer
- Riverside
- Sacramento
- San Benito
- San Bernardino
- San Diego
- San Francisco
- San Joaquin
- San Luis Obispo
- San Mateo

- Santa Barbara
- Santa Clara
- Santa Cruz
- Shasta
- Solano
- Sonoma
- Stanislaus
- Tehama
- Tuolumne
- Yolo
- Yuba

Oregon

- Jackson
- Lane

Washington

- King

Colorado

- El Paso
- Boulder
- Larimer

North Dakota

- Cass

Texas

- Comal



II. BACKGROUND QUALIFICATIONS.....

LOCAL AND NATIONAL COUNCILS, BOARDS, DISTRICTS, AND JOINT POWERS AUTHORITIES (JPAS)

National

- Hass Avocado Board (HAB)
- North American Blueberry Council / U.S. Highbush Blueberry Council (NABC/USHBC)

California

- Bear Valley Community Services District
- Boulder Creek Fire Protection District
- California Prison Industry Authority (CALPIA)
- California Municipal Utilities Association (CMUA)
- Cosumnes Community Services District
- East Bay Regional Communications Systems Authority
- First 5 (Alameda County, California Association, Fresno, Santa Barbara County, San Mateo)
- Los Angeles County Employees Retirement Association
- Los Angeles Unified School District (LAUSD)
- Mendocino County Air Quality Management District
- Metropolitan Transportation Commission (MTC)
- Modesto Irrigation District
- Monterey One Water
- Nevada Irrigation District
- Newark Chamber of Commerce
- Oakhurst Public Utility District
- Orange County Employees Retirement System (OCERS)
- Placer County Transportation Planning Agency (PCTPA)
- Port of Long Beach
- Sacramento Area Flood Control Agency (SAFCA)
- Sacramento Area Sewer District
- Sacramento Employment & Training Agency (SETA)
- Sacramento Public Library Authority (SPLA)
- Sacramento Suburban Water District
- San Benito Council of Governments
- San Benito County Water District
- San Joaquin County Employees' Retirement Association
- San Joaquin Tributaries Authority
- San Rafael Sanitation District (SRSD)
- San Ramon Valley Fire Protection District
- Santa Cruz County Animal Services Authority
- Sonoma County Library
- South Coast Air Quality Management District
- Tri-City Mental Health Authority (TCMHA)
- Truckee-Donner Public Utility District (TDPUD)
- Tuolumne Utilities District
- Valley Consortium for Medical Education (VCME)
- Valley Water
- Water Forum
- West Basin Municipal Water District

Oregon

- Jackson County Fire District 5
- Rogue Valley Sewer Services

Idaho

- Teton County Joint Housing Authority (TCJHA)



II. BACKGROUND QUALIFICATIONS.....

NONPROFITS

National

- Futures Without Violence (Family Violence Prevention Fund)
- Radio Bilingüe

California

- Center Point
- Central California Legal Services (CCLS)
- Community Food Bank
- Downtown Streets Team
- Gold Coast Health
- Greater Richmond Interfaith Program (GRIP)

- Northern Valley Catholic Social Service (NVCSS)
- Options Recovery
- Transitions-Mental Health Association
- West Angeles Church of God in Christ

Oregon

- Community Works
- Dogs for Better Lives / Dogs for the Deaf

PRIVATE ORGANIZATIONS

- CDS Publications
- Central California Truck and Trailer
- Morton & Pitalo
- NAVA
- SWEED
- Tekmanagement
- Touchstone Accounting

CONSULTING SERVICES

Cities

- Fremont (CA)
- Medford (OR)
- Santa Maria (CA)
- Santa Paula (CA)

Counties

- Humboldt (CA)
- Mariposa (CA)
- Santa Barbara (CA)
- San Luis Obispo (CA)



**CENTRAL CALIFORNIA
LEGAL SERVICES**
JUSTICE. EQUITY. POWER.



radio bilingüe
Red Nacional de Radio Pública Latina



Northern Valley
Catholic Social Service
INSPIRING HOPE & TRANSFORMING LIVES

II. BACKGROUND & QUALIFICATIONS.....

INDUSTRIES

- Organizational Leadership
- Economic Development
- Facilities & Operations
- Financial, Administrative Services, Accounting, Auditing
- Health & Human Services, Housing, Unhoused
- HR, Risk, Labor/Employee Relations
- Information Technology
- Legal, Counsel, Clerk
- Library
- Marketing, Communications, PR
- Parks & Rec, Community Services, Arts
- Planning, Environmental, Community Development, Building, Transit
- Public Safety
- Public Works, Transportation, Engineering

BELOW IS A LIST OF SIMILAR RECRUITMENTS WBCP HAS MANAGED:

FINANCIAL, ADMINISTRATIVE SERVICES, ACCOUNTING, AUDITING

- Chief Financial Officer, County of Marin Employees Retirement Agency, CA
- Chief Financial Officer, Social Services Department, County of Santa Barbara, CA
- Chief Financial Officer, Superior Court of California, County of Santa Barbara, CA
- Chief Financial Officer, West Basin Municipal Water District, CA
- Chief Financial Officer, City of West Hollywood, CA
- Chief Financial Officer, Chief of Admin II, Fire Protection District, County of Contra Costa, CA
- Chief Administrative Officer, Port of San Diego, CA
- Division Chief – Auditor Controller, County of San Joaquin, CA
- Vice President of Finance and Administration, North American Blueberry Council, CA
- Director of Administrative Services and Finance, City of Ashland, OR
- Director of Administrative Services and Finance, City of Solvang, CA
- Director of Administrative Services, City of Irvine, CA
- Director of Contracts and Procurement, Valley Water, CA
- Director of Finance and Technology Services, City of Laguna Beach, CA
- Director of Finance, City of Ashland, OR
- Director of Finance, City of Duvall, WA
- Director of Finance, City of Grants Pass, OR
- Director of Finance, City of Laguna Beach, CA
- Director of Finance, City of Lincoln, CA
- Director of Finance, City of Sacramento, CA
- Director of Finance, City of Sonoma, CA
- Director of Finance, City of Victorville, CA
- Director of Finance, Community Food Bank, CA
- Director of Finance, County of Cass, ND
- Director of Finance, County of Jackson, OR
- Director of Finance, County of Marin, CA
- Director of Finance, Monterey One Water, CA
- Director of Finance, Nevada Irrigation District, Grass Valley, CA
- Director of Finance, Transitions Mental Health Association, San Luis Obispo, CA
- Director of Finance, Tuolumne Utilities District, CA
- Director of Finance, West Angeles Church of God in Christ, CA
- Director of Finance/Financial Controller, North American Blueberry Council/USHBC, CA
- Director of Financial Services, San Diego Port Authority, CA
- Deputy Finance Director, City of Phoenix, AZ
- Assistant Director of Finance, City of Roseville, CA
- Assistant Director of Finance, Monterey One Water, CA
- Budget Manager, City of Berkeley, CA

II. BACKGROUND & QUALIFICATIONS.....

FINANCIAL, ADMINISTRATIVE SERVICES, ACCOUNTING, AUDITING (CON'T)

- Finance and Compliance Manager, NABC/USHBC, Folsom, CA
- Finance Manager, City of Milpitas, CA
- Finance Manager, County of Santa Barbara, Department of Behavioral Wellness, CA
- Finance Manager, Town of Truckee, CA
- Financial and Administrative Services Manager, First 5 Fresno, CA
- Procurement and Contracts Manager, Valley Water, CA
- Accounting Manager/Controller, City of South Pasadena, CA
- Controller, Monterey One Water, CA
- Controller, Nevada Irrigation District, CA
- Assistant Auditor–Controller, County of Monterey, CA
- Senior Accountant, Town of Truckee, CA
- Senior Financial Systems Analyst, County of Santa Barbara, CA
- Senior Principal Accountant, City of San Rafael, CA
- Senior Tax Accountant, Touchstone Accounting, OR
- Independent Police Auditor, Bay Area Rapid Transit District (BART), CA
- Internal Audit Manager, City of Pasadena, CA
- Audit Supervisor, County of Santa Barbara, CA
- Lead Internal Auditor, County of Santa Barbara, CA
- Financial Systems Analyst I, County of Santa Barbara, CA
- Financial Systems Analyst I/II, County of Santa Barbara, CA
- Accounting & Finance/Treasury Managers, County of Marin, CA
- Purchasing Agent, City of Milpitas, CA
- Payroll Manager, City of Berkeley, CA
- Payroll Supervisor, County of Santa Barbara, CA
- Accountant Auditor I/II, County of Santa Barbara, CA
- Administrative Technician, Sacramento Area Flood Control Agency (SAFCA), CA
- Interim Auditor–Controller, County of Contra Costa, CA
- Secretary, Sacramento Area Flood Control Agency (SAFCA), CA
- Secretary, Bay Area Rapid Transit District (BART), CA
- Board Support Officer, Valley Water, CA

Check out our full list of
recruitments here:
<https://tinyurl.com/8vjkk7w3>

II. BACKGROUND & QUALIFICATIONS.....

RECRUITING WITH DIVERSITY IN MIND

*Since partnering with the country's largest network of diversity job boards, **we have seen a 21% increase in diverse applicants and a 13% increase in diverse candidates placed in positions with our clients.** This demonstrates WBCP's dedication to expanding outreach and removing barriers to apply, ensuring access to a highly qualified and diverse applicant pool.*

600 Diversity Job Boards:

When you post a job with WBCP, it is automatically shared across 600 diversity job boards, maximizing reach and ensuring access to a wide and inclusive pool of talent. We also utilize the largest diversity database with over 160 million resumes and 15,000 community based organization contacts to expand our search.

LinkedIn:

As LinkedIn recruiters, we have access to over 1 Billion profiles, allowing us to evaluate candidates' backgrounds, education, experience, licensure, and more.

AI:

WBCP also leverages AI tools to gather additional information to effectively reach future applicants and candidates contact information for emails and phone numbers.



WBCP understands the complexities of meeting the needs of a diverse community, and we provide a thorough, complete, and fair recruitment process.

Streamline and Satisfy the RFP Process to receive recruiting on demand. Reach out to WBCP today for more information.



Scan to learn more!



II. BACKGROUND & QUALIFICATIONS.....

WHY CHOOSE WBCP

Proven Expertise:

- **Over 20 Years in Business and 100+ Years of Experience:** With over a century of combined experience, our recruitment professionals excel in public service sectors, including cities, counties, utilities, special districts, joint powers authorities, and non-profits. Our proven track record ensures expertise tailored to your needs.
- **100% Success Rate:** In 2024, we achieved a 100% success rate, successfully filling every position we managed including partial and full scope services from engineering, planning, finance, health and human services, legal, legislative, hard-to-fill civil service positions, and many more! We deliver results no matter what the challenge.

Employer Recognition: WBCP has been recognized as Oregon's TOP 100 EMPLOYERS.

HR Teams Trust Us: We simplify the recruitment process, managing every detail so HR teams can focus on other priorities. From sourcing candidates to scheduling interviews and providing updates, our seamless approach saves time, reduces stress, and ensures results.

Strategic Marketing and Advertising: Our marketing team designs targeted campaigns using diverse, cost-effective channels powered by AI. These campaigns maximize reach while staying within budget and include:

- **Diverse Applicant Pools:** Access to over 600 diversity-focused job boards, 15,000 diversity affiliations, and 120 million resumes ensures diversity is integral to our process.
- **LinkedIn Recruiter Expertise:** With access to 230 million U.S. profiles, we connect you with top-tier talent.
- **AI-Driven Talent Acquisition:** Advanced AI strategies enhance efficiency and uncover new candidate engagement opportunities.

Trusted Partners and Culture Cultivators: We go beyond finding candidates by building trust with your team and stakeholders. Our tailored strategies align top talent with your organizational culture, ensuring a collaborative and thoughtful recruitment process.

Recruiting with Competencies: Ensures a fair, measurable, and effective hiring process. This strategic approach helps identify the client's needs and then assesses candidates on the critical skills and behaviors for success.

Benefits:

- **Fairness:** Focuses on role-specific competencies.
- **Measurability:** Provides objective evaluation criteria.
- **Better Matches:** Aligns talent with organizational and cultural needs.
- **Equitable:** Reduces bias with standardized assessments.

Recruiting with competencies delivers high-quality, measurable solutions that ensure the best candidates for your team's success and cultural alignment.

Timely and effective background and

Reference Checks: WBCP partners with a trusted third party for thorough background checks and relies on a 30-year public safety veteran, retired as a police chief, and an expert in employee investigations, to conduct expert reference verifications. This ensures accuracy, professionalism, and confidence in every hiring decision.

Guaranteed Satisfaction: We stand behind our work with a 12-24 month guarantee. If the initial placement doesn't work out, we will conduct a replacement search at no additional consulting fee, ensuring lasting value for your investment.

III. GUARANTEE.....

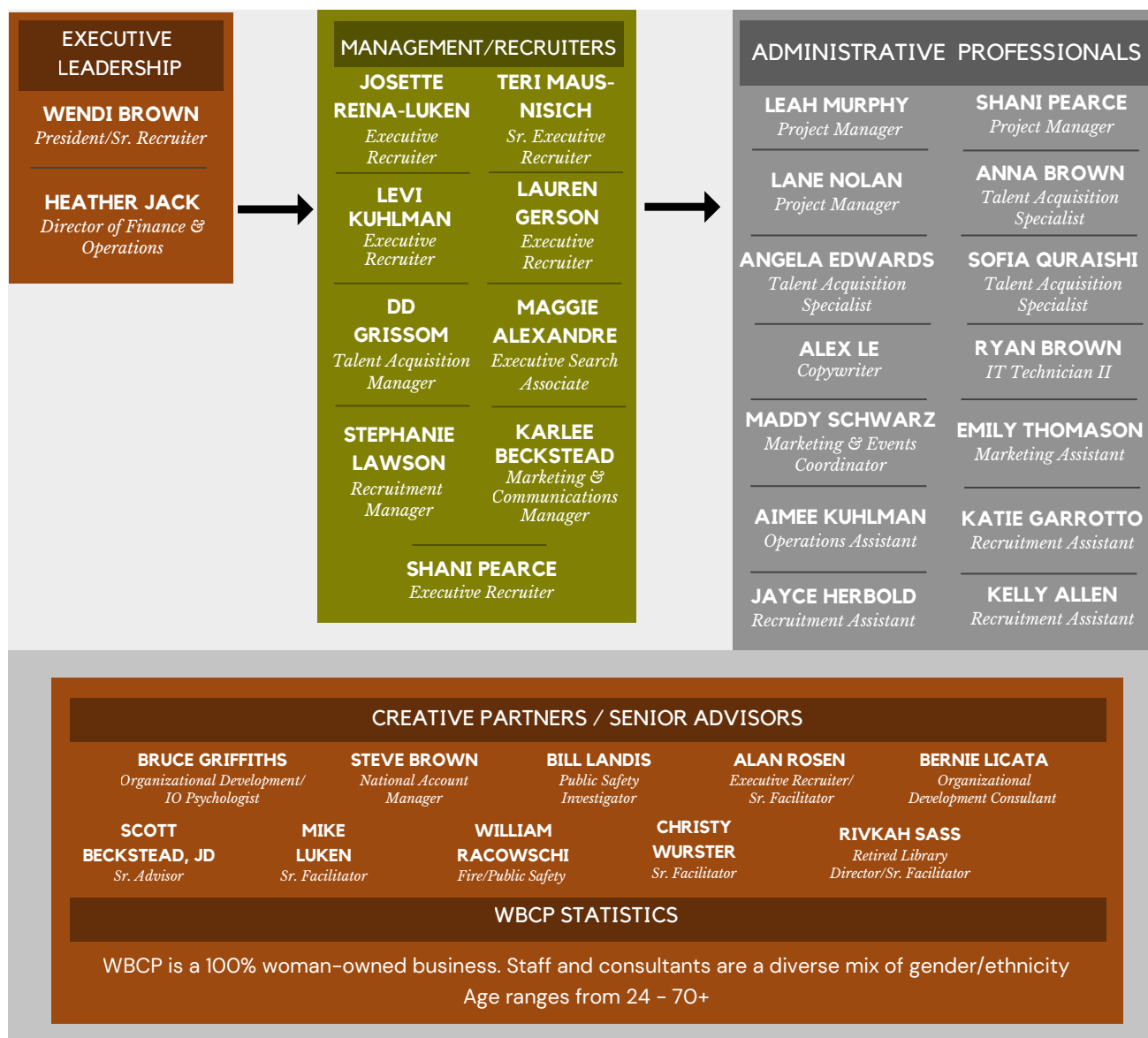
WBCP Inc. provides either a placement guarantee, or a replacement guarantee as determined by the recruitment outcome and defined below:

Successful Placement Guarantee: We guarantee a successful placement and will provide continued consulting services for one additional recruitment at no extra consulting fee. The client will be responsible for any direct expenses.

OR

Replacement Guarantee: If a candidate selected and appointed by the client leaves their position for any reason before completing **12 months** of service, WBCP will provide consulting services at no additional cost to secure a replacement. The client will be responsible for any direct expenses. This guarantee applies to one replacement within one year of the candidate's departure.

IV. ORGANIZATIONAL CHART.....



V. WBCP KEY STAFF.....

WENDI BROWN

*Lead Consultant/
Sr. Executive
Recruiter*



I am the President of WBCP, with over 20 years of experience in marketing and advertising and combine this with my background in recruiting to successfully place hard-to-fill, management, and executive positions. My team and I are passionate about helping organizations improve their recruitment services, place great talent, conduct department assessments, redesign antiquated processes, revise job descriptions, conduct salary and benchmark studies, and more. I have worked in various industries – advertising and public relations, national real estate franchisor, global manufacturing – and I have worked with nonprofit and public sector organizations since 1999. Formerly, I was an internal Human Resources Consultant for the County of Orange, California, providing countywide communications, human resources, executive search, and recruiter training services to the Assistant Chief Executive Office/Human Resources Director and, at that time, 25 decentralized departments, with 17,000 employees, serving a community of 300,000. I have a Bachelor's of Science in Business Administration with an emphasis in Marketing from Colorado Technical University; have earned several certificates in Project Management, Global Business, Marketing, and Human Resources; and working toward a Master's in Management at Southern Oregon University.

TERRI MAUS-NISICH

Sr. Executive Recruiter



Terri Maus-Nisich holds a pivotal role as one of our Senior Executive Recruiters, leveraging her extensive background as a distinguished leader in local government. With a local government career spanning over 40 years, Terri's journey includes transformative roles within the County of Santa Barbara, where she ascended from Parks Director to Assistant County Executive Officer, overseeing vital municipal and health/human service departments. Her remarkable impact encompasses leadership in Homeless Services, Communications, and Emergency Management, driving community engagement, disaster recovery, and support for vulnerable populations. Before her tenure in Santa Barbara, Terri spent 15 years with the City of Santa Clarita in roles ranging from analyst to Deputy City Manager. Throughout her remarkable career, Terri prioritized strategic planning, organizational development, and innovative problem-solving, garnering numerous awards. She holds a Bachelor's Degree from UC Santa Barbara, a Masters of Public Administration from Cal State Northridge, and a graduate certificate from Harvard University's JFK School of Government.

V. WBCP KEY STAFF.....

LAUREN GERSON

Executive Recruiter



Lauren Gerson is a seasoned Executive Recruiter at WBCP, where she draws on over 15 years of experience in career services, customer relations, and operations. Her recruiting expertise extends across various industries, with notable success in health and human services, utilities, and finance. Lauren has helped organizations across multiple states fill hard-to-hire positions at every level, from individual contributors to executives. Lauren's diverse professional journey began in operations and events management, where she honed her expertise in human resources, business management, and regulatory compliance. She later transitioned to career services, and prior to joining WBCP, worked with a career coaching company helping job-seekers better leverage their skills and overcome barriers to employment. Lauren holds a Bachelor's degree in Philosophy from Whittier College. She brings a unique perspective to her role, and is committed to making a positive impact both professionally and personally. With her unwavering dedication and client-centric focus, Lauren continues to drive success and excellence in executive recruitment at WBCP.

LEVI KUHLMAN

Executive Recruiter



Levi Kuhlman is an Executive Recruiter at WBCP, and an experienced professional with a multifaceted career spanning across executive recruitment, real estate, and entrepreneurship. He has worked extensively with local municipalities, special districts, and not-for-profit organizations across the Western region, with a focus in California, Oregon, and Idaho. Levi has conducted many successful recruitments in various industries including planning, rent stabilization and housing, engineering, finance, city management, transportation and transit, community development, building and safety, public safety, risk management, and information technology. Levi serves as a skilled and diplomatic liaison, earning a reputation for his personalized approach to recruiting. Before joining the ranks of WBCP, he advocated on behalf of tenants, landlord, and clients. With a diverse skill set and a commitment to excellence, Levi continues to make significant contributions to WBCP, his clients, and broadening the professional community one recruitment at a time.

V. WBCP KEY STAFF.....

JOSETTE REINA- LUKEN

Executive Recruiter



Josette, an Executive Recruiter at WBCP, specializes in government finance and the water industry with nearly 30 years of experience. Her career began in IT, managing software implementations and leading training and sales teams. After earning her MBA, she transitioned to municipal agencies, holding various management positions, including Administrative Manager and Financial Manager. With expertise in budgeting, strategic planning, and organizational development, Josette has made significant contributions to the agencies she's served. She holds a Bachelor's Degree in Political Science/Public Administration from the University of South Florida, an MBA from the University of Phoenix, and certificates in Human Resources from the California State University and Leadership from the University of Davis.

SHANI PEARCE

Executive Recruiter



Shani Pearce brings over 15 years of corporate and public sector experience to her role as an Executive Recruiter at WBCP, with a background spanning executive support, human resources, project management, and regulatory compliance. She began her career with the City of Medford, working closely with executive leadership on labor relations, wellness initiatives, recruitment, and large-scale events. In the private sector, she advanced as a Human Resources Business Partner, specializing in recruitment, training, and organizational development, before joining a multi-billion-dollar, multi-state energy company where she progressed into project management, overseeing compliance, licensing, permitting, and stakeholder engagement. Alongside her corporate work, Shani co-founded a wedding and event business, further demonstrating her creativity and logistical expertise. At WBCP, she brings this diverse experience to lead recruitment processes, engage with clients, source candidates, and ensure a seamless candidate experience, making her a trusted partner to clients and a valued member of the WBCP team.

REVIEW OTHER EMPLOYEES & CONSULTANT
PARTNERS ON OUR WEBSITE:
WWW.WBCPINC.COM/WBCP-TEAM

VI. RECRUITMENT STRATEGY / PHASES.....

WBCP knows how to customize your search strategy to meet your unique recruitment needs. We customize your recruitment based on the specific needs, target audience, and challenges for each recruitment; however, below is a baseline approach for most recruitments.

CLIENT & STAKEHOLDER MEETINGS

We require the Client and/or Search Committee, and other stakeholders identified by the Client, be involved in the initial and final phases of this recruitment. These are critical phases to ensure we obtain a clear sense of the priorities and the successful hire of the right candidate. WBCP will meet with various stakeholders as warranted by the Client and the level of the position in the organization. These meetings will allow us an opportunity to gather information and gain knowledge about the organization, community, and unique aspects of the recruitment to design the ideal candidate professional profile, advertising materials, and strategic approach



FEEDBACK OUTCOME / TIMELINE DEVELOPMENT

Following the Client/stakeholder meetings, we will develop a detailed timeline for the recruitment along with a proposed advertising plan for approval.

CREATIVE DEVELOPMENT

Immediately following the client feedback activities, we will draft the competencies for the recruitment and advertising material/recruitment brochure for the Client's review. This information will summarize what was learned from Client-related interviews and will be used to advertise the opening.

MARKETING STRATEGY & IMPLEMENTATION

WBCP will execute a customized marketing/ad plan once the job announcement is created. An ad plan could include the following (based on assumptions), and will be customized based on information gathered in Phase I:

DIGITAL ADVERTISING WITH DIVERSITY IN MIND

WBCP utilizes digital advertising to obtain diverse applicant pools, leveraging local and national job boards, associations, and social media. In partnership with a diversity platform, our postings reach up to 600 local employment and diversity websites, connecting across 15,000+ community organizations and niche sites, tapping into a job bank of 2 million resumes. Upon our 2024 year-end review, we found that over the last three years 63% of our placed candidates came from diverse backgrounds.



EMAIL & DIRECT MAIL ADVERTISING

In addition to tapping into WBCP's existing pool of potential applicants, we have the capability to access various professional lists. We actively seek out additional lists through associations, contacts, and other strategic channels.

SOURCING/HEADHUNTING

WBCP employs a proactive approach by reaching out to targeted individuals and cultivating new connections through referrals from reputable sources. As a LinkedIn recruiter, we harness the power of over 350 million profiles to identify and engage with ideal candidates. Additionally, WBCP utilizes cutting-edge AI tools for precise Boolean searches, enabling us to uncover niche candidates effectively.

COMMUNICATION WITH CLIENT

We will provide weekly updates on the progress of this search unless the client prefers more or less frequent communications. We tailor our communications in accordance with our Client's needs.

VI. RECRUITMENT STRATEGY / PHASES.....

RESUME ASSESSMENT

WBCP will review resumes as they are received and/or at the close of the recruitment. Those candidates determined to be the most highly qualified will be selected for a screening interview.

SCREENING INTERVIEWS / REPORT TO CLIENT

WBCP does not restrict the number of applicants or candidates to be screened. Rather, we interview candidates who meet our ideal candidate criteria; frequently this group amounts to 20 candidates, or on average 20% of the applicant pool. Following the completion of the phone screen interviews, we will develop a report/recommended shortlist of candidates, which includes: resumes, cover letters, and a one-page profile summary of candidates' professional history, including a brief overview of WBCP's assessment and the results of their phone screen. We will meet with the selection committee/Client to review this report and select candidates for interviews. In this meeting, we will review the recruitment plan and discuss the final stages of the selection process.



COMMUNICATION WITH CANDIDATES

WBCP will take responsibility for communicating with the applicants/candidates during each phase of the search process and Client should refer any inquiries from potential or existing applicants directly to WBCP.

SELECTION PROCESS

WBCP will design and administer an appropriate final selection process based on the needs of the Client (tailored to the need and recruitment). WBCP will facilitate the invitation and coordination of these meetings/interviews and provide additional assessment tools/recommendations such as interview questions, writing and presentation exercises, problem solving scenarios, etc.

COMMUNICATION WITH CLIENT

Following the interviews and the Client's top candidate(s) selection, we will assist the Client with facilitating a thorough background and reference check. A typical approach includes a review of federal, state, and local criminal background checks and academic verification by a licensed background agency. Reference checks are conducted over the phone by a senior consultant and a final report is provided to the Client. References are completed on candidate(s) being considered after initial/panel interviews.



NEGOTIATIONS

Once the client reviews and is comfortable with the findings in the background and reference report, we are available to assist with negotiations on compensation, benefits, start date, and other transition details.

VII. SCOPE OF WORK.....

- Facilitate initial kick-off meeting with Client and other meetings that may include Executive Leadership, staff, community, and other stakeholders to assist with identifying the ideal candidate profile.
- Assist Client hiring authority/stakeholders in modifying the job description (as needed), and develop a recruitment announcement, marketing materials, and advertising plan for the recruitment.
- Attend all other meetings and engagements as needed or identified by the Client.
- Implement advertising plan including: publication, headhunting, direct mail, and other online and email marketing efforts.
- Provide timely updates and progress reports to the client regarding search services; every two weeks or as Client identifies is needed.
- Preliminary internet searches will be conducted on recommended candidates.
- Coordinate interview panel(s) as needed, or coordinate this process with Client.
- Receive and review applicants and screen those applicants to identify top candidates. Top screened paper applicants will be video/phone screened by recruiter to identify the key competencies (technical and interpersonal) to assist in identifying the top group of candidates who will be recommended at the Client/WBCP shortlist meeting.
- Facilitate shortlist meeting with Client – review and select candidates who will be invited to interview.
- Coordinate invitations to candidates.
- Develop interview questions and other selection details to meet specific needs and identify key competencies of candidates.
- Facilitate interviews with panel(s).
- Background and reference checks will be conducted with candidates who are identified as final candidates after initial Client interviews have been conducted. Background checks will be conducted in accordance with local law and typically include the following: criminal (local, state, and federal), education, credit, social security. References will be conducted based on a 360-degree perspective and will include staff, peers, and superiors. Onsite background services are available at an additional fee (see fees for details)
- Facilitate offer and negotiations with selected candidate; as directed by Client.

VIII. RECRUITMENT TIMELINE.....

*BELOW IS A SAMPLE OF AN EXECUTIVE SEARCH TIMELINE THAT
WBCP WILL CUSTOMIZE FOR THIS RECRUITMENT*

Week 1:

- Secure services with search firm, WBCP, Inc.
 - WBCP can schedule a Kickoff meeting as soon as we are selected.
- WBCP: review search parameters and recruiting processes with Client
 - Interview with hiring authority and other stakeholders for competencies
 - Identification of advertising venues and ideal candidate prospects
 - Calls, meetings, or coordination with other stakeholders for information gathering

Weeks 1 + 2:

- Develop and approvals: recruitment process, deadlines, ad plan and strategy, recruitment timeline and brochure
- Print coordination (if applicable)

Weeks 2 + 3:

- **OPEN RECRUITMENT AND AD PLAN:** Implement marketing plan and direct mail (if applicable)
- Secure panel member calendars
- Timeline may be extended if direct mail piece is included (i.e., print/postage)
- Finalize panel members and interview logistics and invitations to panel members

Weeks 4, 5, + 6:

- Receive applications –Collect and source applicants will continue until recruitment closes

Weeks 7 + 8:

- **CLOSE RECRUITMENT AND ADVERTISING**
- Conduct initial phone screen to identify shortlist of candidates
- Preliminary check on shortlist candidates (Google search)
- Candidate profiles developed and short list recommendations to client

Weeks 9 + 10:

- **MEETING – Client confirms selection of candidates to be advanced to panel interviews**
- Finalize questions, presentation, in-basket (as determined)
- Coordinates invitations with selected top candidates (shortlist)
- Produce panel candidate interview packets

Weeks 10 + 11:

- WBCP facilitates interview process – Interview process will be customized based on client and community needs:
 - **Day 1: Panel Interviews Conducted; Day 2: 2nd Interviews with executive leaders;**
 - 3rd interviews may be scheduled as needed with Boards/Commissions, etc.;
 - As needed schedule staff and/or community discussions/meetings

Week 12:

- WBCP conducts background and reference checks (backgrounds may be conducted by Client if current contract exists)
- WBCP conducts full reference checks for candidate(s) selected for Board/Commission interviews; or when Client is interested in making an offer

NEGOTIATIONS / HIRE:

- Hire date to accommodate possible candidate relocation
- Client (WBCP available to assist in process) conducts offer and facilitates salary negotiations with preferred candidate

IX. REFERENCES.....

1-Monterey One Water

Positions filled:

- Director of Finance

Contact Information:

- Leara Sampson, Director of Employee Services – leara@my1water.org | 831-645-4650

2-City of Phoenix, Arizona

Positions Filled:

- Finance Director
- Deputy Finance Director

Contact Information:

- Megan Avalos, Deputy HR Director – megan.avalos@phoenix.gov | 602-262-6708

3-Nevada Irrigation District, California

Positions Filled:

- Director of Finance
- Controller

Contact Information:

- Jennifer Hanson, General Manager – hansonj@nidwater.com | 530-273-6185

4-Los Angeles County Employees Retirement Association (LACERA)

Positions Filled:

- Information Technology Manager II – Business Solutions
- Information Technology Manager II – Project Management Office

Contact Information:

- Connie Chan, Senior Human Resources Analyst – cchan@lacera.com | 626-408-8517

X. MARKETING MATERIAL EXAMPLES.....

*Click below to see our marketing samples for similar positions. To see all of our brochures, visit: wbcpinc.com/closed-jobs-private/ and use the password: wbcp202510**

- [Finance Director, City of Phoenix, AZ](#)
- [Finance Director, Cass County, ND](#)
- [Assistant Director of Finance, Monterey One Water, CA](#)
- [Budget Manager, City of Berkeley, CA](#)
- [Deputy Finance Director, City of Phoenix, AZ](#)
- [Chief of Admin II / Chief Financial Officer, Contra Costa County Fire Protection District, CA](#)
- [Director of Finance, Monterey One Water, CA](#)

XI. COST SHEET/TIMELINE POLICY.....

WBCP will not limit the number of hours we work on a recruitment, rather we charge a flat rate and will spend the time necessary to ensure we are successful. Consulting fees will be billed in thirds at the beginning (open for applications and advertising campaign launched), middle (shortlist selection), and end of the recruitment process (selection made and background/ references concluded).

SERVICE COST PER RECRUITMENT

CHIEF INVESTMENT OFFICER

Description of Services/Deliverables:	Inclusive Rate per Recruitment:
Consulting Services: Phases I-IV in the proposal's recruitment strategy/phases section.	\$24,900
Expenses Include: Travel to client location (up to 2 trips); document shipping fees/delivery charges to facilitate virtual meetings, panel packet content; fees for background and reference checks; may include fee for one additional consultant to travel (and related expenses) and facilitate an additional panel for one day (\$700/day); brochure/graphic design (\$950); marketing and advertising which may include: print and postage (if applicable); online job boards; social media; sourcing; and may include flat fee pricing for: LinkedIn \$395, InMails \$300, Circa Diversity Job Boards \$295, Zoom Info \$299. These expenses will be billed based on what is expended and based on the needs of the client/recruitment.	Up to \$5,500 – \$7,900 (direct expenses not-to-exceed)

Additional Cost

Upon request, WBCP can coordinate candidate travel and related expenses. Since this service falls outside of the standard scope of work, clients who choose this option should anticipate an estimated travel reimbursement of up to \$1,500 per non-local candidate. This estimate typically covers lodging, primary transportation, and/or a stipend.

Timeline Policy

To ensure the success and efficiency of our recruitment services, the following policies regarding cost and timelines are in place:

- 1. Timeline Development:** Timelines provided to our clients are valid for **10 business days**. If a timeline is not secured or confirmed within this period, it may no longer be available. In such cases, the timeline may be reassigned to another client, and a revised timeline will be provided.
- 2. Work Performed Out of Scope:** To deliver optimal results, adherence to agreed-upon dates and times for critical recruitment milestones (e.g., shortlist meeting and interview dates) is required. Any changes to these timelines after the recruitment process has commenced may result in:
 - a. Forfeiture of the Recruitment Guarantee:** Deviating from the agreed timeline will void the recruitment services guarantee.
 - b. Additional Charges:** Adjustments to timelines will incur additional fees, billed at our standard hourly rate.

Proposal Negotiations

While our standard pricing reflects the value and quality of our recruitment services, we recognize that each client's needs are unique. As such, we are open to discussing pricing options and also offer flexible partial search services that can be tailored to meet your specific requirements.

XII. OTHER.....

INSURANCE

WBCP and its sub-consultants have reviewed the contractual agreement and the Insurance Requirements. If selected, WBCP will execute said agreement and will provide the required insurance documents. WBCP will submit certificates of insurance as evidence of the required coverage limits. Insurance policies include: liability, errors and omissions, workers compensation, and vehicle insurance.

CONFIDENTIALITY SAFEGUARDS

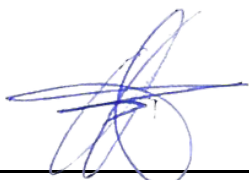
Confidentiality is paramount in the work we do. We ensure that the client and candidate information we receive, and conversations with our client (and certainly discussions in closed session) are kept confidential. There are several physical safeguards we have in place including: locked and alarmed office space, password, and encryption protected information on our computers and servers, multiple backup systems. As information is shared with our client, we discuss the importance of confidentiality and why it is important to the candidates they are considering but also brands the organization appropriately. We also ask candidates who are interviewed to keep candidate information confidential, as they may see or meet a candidate during the process. We emphasize that confidentiality is not just until the recruitment is completed, and a candidate is hired, confidentiality is in perpetuity. Leaked information is not a reputation that a client wants to receive, as this could deter future applicants from applying.

ORGANIZATIONAL DIVERSITY STATEMENT

WBCP embraces cross-cultural diversity and we are committed to equitable treatment and elimination of discrimination in all its forms at all organizational levels and throughout all consulting practices, including search services. We strive to reach diverse groups of people to inform them of leadership opportunities. Upon our 2024 year-end review, we found that over the last three years, 70% of our applicants and 63% of our placed candidates came from diverse backgrounds. We will make extensive efforts to attract a qualified applicant pool that represents a broad range of gender and ethnically diverse individuals.

FORCE MAJEURE

Client agrees that WBCP, Inc. is not responsible for any events or circumstances beyond its control (e.g., including but not limited to war, riots, embargoes, strikes, and/or Acts of God) that prevent WBCP, Inc. from meeting its obligations under this Agreement.



Wendi Brown, President

SEPTEMBER 30, 2025

Date

Client, Title

Date