



***Proposal for Professional Executive Director Search Services - Fresno Council of Governments (Fresno COG)***

1. *Letter of Interest:*

Subject: Letter of Interest and RFP Response for Professional Executive Director Search Services

The Norfus Firm, PLLC (“TNF”) is excited about the prospect of contributing to the Fresno COG's continued success and growth by securing a dynamic and visionary Executive Director. Our team is prepared to dedicate our utmost efforts to identify the ideal candidate who will make a significant impact on Fresno COG's future.

Leadership teams with diverse perspectives, backgrounds and experiences are a proven driver of innovation and can increase an organization's bottom line. We are uniquely poised to help you fill executive positions through an equitable and inclusive search process that results in a diverse slate of candidates. Through the use of our data, search software, well-developed networks, and disciplined search process, we identify high-quality talent for your organization quickly and effectively.

As a leading executive search firm with an exceptional track record, we understand the vital role that the Executive Director plays in shaping the vision and success of an organization. Our team is committed to providing an unparalleled level of service and expertise in identifying the most qualified and talented individuals who will drive the Fresno COG's mission forward.

*Proposal Highlights:*

- **Extensive Experience:** Our firm has successfully completed numerous executive search assignments across diverse industries and sectors. Our experience allows us to approach each search with a tailored strategy, ensuring the identification of candidates who possess the right skills, experience, and cultural fit for the Fresno COG.
- **Nationwide Reach:** With a vast network and resources across the nation, we have the ability to source top-notch candidates from a wide range of

geographical locations, ensuring a comprehensive and diverse candidate pool.

- Customized Search Approach: We recognize that each organization is unique, and the Fresno COG is no exception. Our team will work closely with your organization to understand the specific needs and values that align with the Fresno COG's mission, vision, and strategic goals.
- Rigorous Evaluation Process: Our rigorous candidate evaluation process includes thorough background checks, in-depth interviews, and comprehensive assessments to ensure that only the most qualified candidates proceed to the final stages.
- Timely Execution: We are committed to meeting the tight deadline set forth in the RFP. Our team is well-versed in efficient project management with a goal of completing the candidate selection no later than December 13, 2023. We note, however, that searches of this nature can take up to 8 months in our experience.
- Transparent Communication: We believe in maintaining transparent and open communication throughout the entire search process. Regular updates and progress reports will be provided to keep the Fresno COG informed at every stage.

Our firm is thrilled to have the opportunity to participate in this RFP process, and we are confident that our firm's expertise, dedication, and proven results make us the ideal partner for this critical executive search. Please find our detailed response to the RFP attached herewith.

Should you have any questions or require further information, please do not hesitate to reach out to us. Thank you for considering our proposal, and we look forward to the opportunity to contribute to the Fresno COG's ongoing success.

**The Norfus Firm, PLLC**

*Natalie E. Norfus*

Natalie E. Norfus

Founder and Managing Owner

[natalie@thenorfusfirm.com](mailto:natalie@thenorfusfirm.com)

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2. Experience and Qualifications:

**Natalie E. Norfus, Founder & Managing Owner.** Natalie has nearly 20 years of experience as an employment lawyer and Human Resources and Diversity, Equity & Inclusion expert. As relevant here, Natalie has worked with employers around the world, across varying industries on developing equitable and inclusive recruiting practices. More can be learned about Natalie's experience [here](#) and on our [website](#).

**Theo M. Wright, Sr., Head of Operations & HR Consultant.** Theo has over 20 years of experience in the areas of Operations and Human Resources management. Theo has worked across various industries – ranging from hospitality to non-profit management. Theo also ranked in the top 25% of recruiters on LinkedIn in 2022 and leads The Norfus Firm's recruiting efforts for various clients. More can be learned about Theo's experience [here](#) and on our [website](#).

**Stephanie Wesolek, Project Manager.** Stephanie has nearly 30 years of experience as a Paralegal and Project Manager. Stephanie has developed a client-centric approach that focuses on timely and efficient delivery of services. More can be learned about Stephanie [here](#) and on our [website](#).

3. Understanding of the Project: An Executive Director for Fresno COG must have the ability to serve as a consensus builder who facilitates the development of innovative programs and solutions to regional issues that transcend political boundaries. Given that the Executive Director will be leading an organization whose members represent various regional local governments, it will also be critical for the Executive Director to prioritize citizen engagement in planning processes, and help ensure that member entities receive proper technical support. Finally, the Executive Director must have strong emotional intelligence, experience with leading individuals with diverse backgrounds and experience, and the ability to create accountability measures for the organization.

#### 4. References

- Catherine Howard  
President  
Community Vision Capital & Consulting  
Email: [choward@communityvisionca.org](mailto:choward@communityvisionca.org)  
Phone: 415.392.8215 x336

Searches Covered: We served as Community Vision's outsourced search firm from February 2021 to September 2023 and have successfully completed more than 20 placements at all levels of the organization.

- Richard Kohan  
President, Board of Trustees  
National YoungArts Foundation  
Email: [rkohan@afollc.net](mailto:rkohan@afollc.net)  
Phone:

Searches Covered: Senior Director, People & Culture; Senior Director, Equity & Belonging; and President (position is f.k.a Executive Director). We also conducted all of YoungArts recruiting for positions at all levels of the organization for the four month period during which YoungArts did not have a head of HR.

- Alethia Nancoo  
Partner, Global Board Member  
Squire Patton Boggs  
Email: [alethia.nancoo@squirepb.com](mailto:alethia.nancoo@squirepb.com)  
Phone: 202.457.6346

Search Covered: We led Squire Patton Boggs's search for a Global Head of Diversity, Equity & Inclusion.

5. Project Management:

**Theo M. Wright, Sr., Head of Operations & HR Consultant.** Theo will be the lead consultant on this project, which includes leading any necessary industry/candidate research, sourcing candidates, conducting screening interviews, designing a chemistry discussion case study, and serving as the main point of contact or the scheduling of interviews between candidates and Fresno COG representatives.

**Stephanie Wesolek, Project Manager.** Stephanie will support the entire search process by helping to ensure deadlines are set in our project management tool, conduct all candidate reference checks, and provide other needed administrative support.

**Natalie E. Norfus, Founder & Managing Owner.** Natalie will work with Theo and Stephanie to align on the search strategy and the design of the chemistry discussion case study.

6. Methodology: TNF recognizes the importance of quickly and efficiently identifying talent for open positions and engages in the following recruiting process:

- *Step One - Align on Role Scope.* To ensure that the process is equitable and inclusive, we seek input from various voices in the organization to understand the needs of the role. We start with those who are directly involved in the hiring process - in this case the Fresno COG staff and the Fresno COG Executive Search Ad Hoc Committee - and then move on to other members of the organization as agreed upon with the Executive Search Committee.
- *Step Two - Resume Screening.* We screen all resumes that are received to identify ideal candidates for the role at hand. We also proactively seek out candidates through our networks and related recruiting software.

- *Step Three - Conduct Screening Interviews.* We conduct screening interviews of potentially qualified applicants using pre-set interview questions that help ensure that the interview process is free from bias.
- *Step Four - Cloverleaf Assessments.* For candidates that are advanced to the Executive Search Committee, we will invite them to Cloverleaf, a tool that allows employers to invite candidates to take various assessments to see how they might lead and otherwise perform within an organization. Cloverleaf assessments include tried and true, scientifically backed assessments including DISC, 16 Behaviors, and Enneagram.
- *Step Five - Advance Qualified Candidates.*
  - We advance and schedule second round interviews for qualified candidates to the Executive Search Committee. We also provide a candidate evaluation form for interviewers to complete.
  - Once finalists are identified by the Executive Search Committee, we check the professional references provided by each finalist.
  - While not required, we highly recommend chemistry discussions between finalists and their potential direct reports (and other designated staff). We sit in on such discussions to observe how the finalists and staff interact so that the Executive Search Committee has a fuller picture on the potential viability of a finalist.
  - Once all scorecards have been completed, references checked, and any chemistry discussions have taken place, we convene the Executive Search Committee to review details from the search and confirm the finalist to whom it wishes to make an offer.
- *Step Six - Make Offers.* We make initial offers to and handle any related negotiations with the selected candidate(s).
- *Administrative Details:*
  - We seek to identify 3 candidates for the Board Search Committee to interview in a relatively close period of time to ensure equity in the interview process (i.e., avoiding any advantage to one candidate over the other based on the timing of their interview with the Board).
  - We pass along up to 3 candidates for the Board Search Committee's interview and consideration. We coordinate the

scheduling of these interviews with the candidates and committee members.

- If chemistry discussions are chosen, we work to have them completed within 15-30 days from the date the Board Search Committee identifies finalists.
- We schedule bi-weekly meetings to cover the status of the search.
- We convene a final meeting with the Board Search Committee to decide on the candidate(s) to whom it wishes to make an offer. We pre-schedule this meeting within days of the chemistry discussions.
- Finally, we make the offer and negotiate with the top candidate, if desired.

7. Project Costs\*: Our Project Costs are based on an estimated completion date of July 1, 2024. If the search is not completed by July 1, 2024, the additional fees required are noted below.

### **Consultants' Hourly Rates<sup>1</sup>**

*Natalie E. Norfus* - \$675

*Theo M. Wright* - \$275

*Stephanie Wesolek* - \$150

### **Total Fee**

\$40,000<sup>2</sup> if the search is completed by July 1, 2024, which is payable as follows:

- Upfront Administrative Fee: \$7,500. The Administrative Fee covers the work to be performed in Task 1, placement of the job listing in our search

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<sup>1</sup>We have included our hourly rates in compliance with the RFP requirements, but would be charging a flat monthly fee if selected as further described above.

<sup>2</sup>It is difficult to predict the amount of time that will be involved in a search of this nature because it is heavily dependent on factors outside the control of the search firm including, for example, the amount of time it takes for key stakeholder to make decisions about salary and job description modifications, the number of applicants or candidates in the search pool, and interview scheduling/availability. As a result, we typically charge an upfront administrative fee of \$10,000 and a fee equivalent to 25% of a successfully placed candidate's first year salary. That said, we are interested in working with Fresno COG, we have provided our Project Costs within the parameters laid out by the RFP.

programs, and the initial requests for information needed to develop a project management timeline.

- 3 Monthly Payments (April 2024, May 2024 and June 2024): \$10,833.34 (April), \$10,833.33/month (May), and \$10,833.33 (June).
- Additional Fee: If the search is not completed by July 1, 2024, then the monthly fee will be \$13,333.33 until the search is completed.

### **Scope of Services (with Time Investment)**

#### *Task 1 - Executive Director Recruitment Process Schedule*

*Time Investment: up to 3 days*

- Theo: 2-3 hours
- Stephanie: 1-2 hours
- Natalie: 2-3 hours

#### *Task 2 - Fresno COG Policy Board Member Interviews (Coincides with Step One of TNF's Methodology)*

*Time Investment: up to 14 days*

- Theo: 10-15 hours
- Stephanie: 5-7 hours
- Natalie 7-10 hours

*NOTE: For efficiency's sake, we propose utilizing a Board survey and a joint listening session to get feedback from the Board based on their survey responses.*

#### *Task 3 - Develop Executive Director Job Description, Salary Range, and Job Announcement (Coincides with Step One of TNF's Methodology)*

*Time Investment: up to 10 days*

- Theo: 10-15 hours
- Stephanie: 3-5 hours
- Natalie: 1 - 3 hours

#### *Task 4 - Fresno COG Executive Director Recruitment Plan (Coincides with Step One of TNF's Methodology)*

*Time Investment: up to 7 days*

- Theo: 5-7 hours



- Natalie: 3-5 hours

*Task 5 - Fresno COG Executive Director Recruitment Process (Coincides with Steps Two, Three & Four of TNF's Methodology)*

*Time Investment: up to 30 days*

- Theo: 45 - 55 hours
- Natalie: 5 - 10 hours

*Task 6 - Fresno COG Executive Director Selection Process (Coincides with Steps Five and Six of TNF's Methodology)*

*Time Investment: up to 21 days*

- Theo: 10 - 15 hours
- Natalie: 3 - 5 hours