

CITY OF ST JOSEPH

REQUEST FOR PROPOSAL

NO RFP2023-30

Page 1 of 8

Proposals Must Be Received No
Later Than

Time: 3:00pm Date: 06/12/2023

For Information Contact

Purchasing

at (816) 271-5330

This document constitutes a request for sealed bids, including prices, from qualified individuals and organizations to furnish those services and/or items as described herein. All documents included in submission are to be of public record.

Proposals must be mailed or delivered to the Division of Purchasing, 1100 Frederick Avenue Room 201, St. Joseph, MO 64501.

Executive Search Firm Finance Director Candidate Search

Please complete, sign and return this form with the proposal

Please have the Bid Name and Number on the outside of the sealed proposals.

The offeror must provide all information required in this document pursuant to the specifications attached and included herein.

The offeror hereby agrees to provide the services and/or items at the prices quoted, pursuant to the attached terms and conditions of Request for Proposal or Invitation to Bidders and Terms and Conditions of Purchase, and further agrees that when this document is countersigned by an authorized official of the City of St. Joseph, a binding contract, as defined herein, shall exist between the offeror and the City of St. Joseph.

SIGNATURE REQUIRED

Offeror's Signature: _____ Offeror's Printed Name: _____ Title : _____

Company Name: _____ Date of Proposal: _____

Mailing Address: _____ Telephone: _____

City: _____ State: _____ Zip: _____

Email Address: _____

CITY OF ST. JOSEPH
PURCHASING DIVISION
TERMS AND CONDITIONS OF REQUEST FOR PROPOSAL
OR INVITATION TO BIDDER

1. PREPARATION OF BIDS

- a. Bidder's are expected to examine the specifications, delivery schedule, bid prices, and all instructions of the Request for Proposal or Invitation to Bid. Failure to do so will be at bidder's risk. In case of a mistake in extension, the unit price(s) will govern. In case of an identified mistake in calculation the City may, but is not obligated to, correct the calculation based on the unit price submitted by the bidder.
- b. Any manufacturer's names, trade names, brand names, information, and/or catalogue numbers listed in a specification are for information and are not intended to limit competition. The bidder may offer any brand which meets or exceeds the specification for any item. If bids are based on equivalent products, indicate on the bid form the manufacturer's name and model number. The bidder shall explain in detail the reasons why the proposed equivalent will meet the specifications and not be considered an exception thereto. Bids which do not comply with these requirements are subject to rejection. Bids lacking any written indication of intent to bid on alternate brands will be received and considered in complete compliance with the specifications as listed on the bid forms.
- c. All supplies and equipment offered in a bid must be new and of current production unless the Request for Proposal or Invitation to Bidder clearly specifies that used or reconditioned supplies or equipment be offered.
- d. Firm fixed prices shall be bid and include all packing, handling, and shipping charges.
- e. Unless otherwise indicated, prices quoted shall be firm for acceptance for ninety days (90) from bid opening and for the specified contract period.

2. TAX EXEMPTION

- a. Do not bill federal tax. Certificate number 44-6000256.
Do not bill state tax. Certificate number 12493457.

3. SUBMISSION OF BIDS

- a. A bid submitted by a bidder must (1) be manually signed by the bidder on the Purchasing Division's Request for Proposal or Invitation to Bidder, (2) contain all requested information, (3) be priced as required, (4) be sealed in an envelope or container, (5) be attached to a security deposit if required, and (6) be delivered to: the Purchasing Division, 1100 Frederick Avenue, Room 201; St. Joseph, MO 64501, and officially clocked in no later than the exact time and date specified on the Request for Proposal or Invitation to Bidder.
- b. The sealed envelope or container containing a bid should be clearly marked on the outside left corner with (1) the official Price Inquiry number and (2) the official closing date and time.
- c. Submission of this bid constitutes an assignment by the bidder to the City of all rights, title, and interest in and to all causes of action it may have under the antitrust laws of the United States or the State of Missouri, which causes of action have accrued or will accrue as the result of or in relation to the particular good or services purchased or procured by it in fulfillment of any contract with the City arising from this bid.

4. MODIFICATION OR WITHDRAWAL OF BIDS

- a. Bids may be modified or withdrawn by written or telegraphic notice received prior to the official closing date and time specified. Written notice may be in the form of an email provided the email is actually received by the Purchasing Agent prior to the official closing date and time specified; any email that is not actually received, whether due to a delay in delivery, delivery to a filtering service that does not release the email, or other failure in delivery shall not be deemed to be a written notice of modification or withdrawal. A bid may also be withdrawn or modified in person by the bidder or his authorized representative provided proper identification is presented before the official closing date and time. Verbal phone requests to withdraw or modify a proposal will not be considered.

- b. After the official closing date and time, no bid may be modified or withdrawn.

5. BID OPENING

- a. Bid openings shall be public on the date and at the time specified on the bid form. It is the bidder's responsibility to assure that his bid is delivered at the proper time and place of the bid opening. Bids which for any reason are not so delivered will not be considered. Offers by facsimile, telegraph, email, or telephone will not be acceptable. Bid files may be examined during normal working hours by appointment. Bid tabulations will not be provided by telephone.

6. AWARDS

- a. Unless otherwise stated in the Price Inquiry, cash discounts for prompt payment of invoices will not be considered in the evaluation of prices. However, such discounts are encouraged to motivate prompt payment.
- b. As the best interest of the City may require, the right is reserved to make awards by item, group of items, all or none or a combination thereof; to reject any and all bids or waive any minor irregularity or technicality in bids received.
- c. Awards will be made to the bidder whose bid (1) meets the specifications and all other requirements of the Price Inquiry and (2) is the lowest and best bid, considering price, responsibility of the bidder, the best interest of the City, and all other relevant factors. When multiple bidders are equally responsible and qualified and submit equivalent bids, those bidders that are equally responsible and qualified and submit equivalent bids may be allowed to submit a subsequent lower bid price in accordance with a schedule established by the Purchasing Agent; such bid price must be submitted in a sealed envelope or container clearly marked on the outside left corner with (1) the official Price Inquiry number and (2) the closing date and time established by the Purchasing Agent; the submission may modify only the bid price.
- d. Each bid is received with the understanding that the acceptance in writing by the City of the offer to furnish any or all the materials, equipment, supplies, or services described therein shall constitute a contract between the bidder and the City; and shall bind the bidder to furnish and deliver at the price, and in accordance with the conditions of said accepted bid and detailed specifications.
- e. The City of St. Joseph is not obligated for expenditures unless funds have been encumbered by Purchase Order or Contract. The completion of the "Notice of Award" by the City is not an authorization for shipment or to proceed with services.

7. OPEN COMPETITION

- a. It is the intent and purpose of the Purchasing Division that the Price Inquiry permits free and open competition. However, it shall be the bidder's responsibility to advise the Purchasing Division if any language, requirements, or any combination thereof, inadvertently restricts or limits the requirement to a single source or otherwise prohibits the submission of a bid. The notification should be received by the Purchasing Division at least ten days prior to the Price Inquiry closing date and time. The bidder may submit notification after the bid closing providing sufficient time is permitted for a thorough review by the Purchasing Division and its decision will be final.

**Request for Proposals
Executive Search Firm
Finance Director
Candidate Search**



DUE DATE: June 12, 2023

RFP2023-30

**CITY OF ST. JOSEPH, MISSOURI
1100 Frederick Avenue
Room 305
816-271-4610
www.stjosephmo.gov**

I. Introduction

The City of St. Joseph, Missouri is seeking proposals from qualified firms/providers to perform executive search services to identify a new Finance Director. The City will accept proposals from firms/providers interested in providing the requested services outlined below in the Scope of Work section.

II. General Information

The City of St. Joseph is located at the intersection of Interstate 29 and US Highway 36, approximately 35 miles due north of Kansas City, Missouri. With a population of 72,473, St. Joseph is the eighth largest city in the state of Missouri and the largest city in northwest Missouri. St. Joseph serves as the County seat for Buchanan County.

St. Joseph is a constitutional home rule city, with a council-manager form of government. The St. Joseph City Council is comprised of a mayor and eight council members. The City Council approves the appointment of the City Manager and City Clerk. The City Manager oversees all other staff members and hires all department heads, including the Finance Director.

The Finance Department has a total of 26 employees. The Assistant Director of Finance is the only employee that directly reports to the Finance Director. 6 employees work in the Customer Service Department, and 6 employees work in Municipal Court. 14 employees work directly in the Accounting Department.

The Finance Department oversees the City approximately \$215,000,000 municipal budget, including the sewer and landfill enterprise funds.

III. Scope of Work

Phase I: Needs Assessment/Information Gathering:

- Work with key officials to:
 - Develop a description of the ideal candidate.
 - Become familiar with the issues the next Finance Director will face.
 - Gather information to distribute to potential candidates.
 - Understand the compensation package components the City is willing to consider as part of its offer.
 - Recommend and discuss the preferred process for interviewing selected finalists.

- Develop materials to be used to recruit candidates.

Phase II: Candidate Recruitment:

- Actively search for, identify, and recruit outstanding candidates best suited for the position.
- Distribute the recruiting materials to appropriate publications and websites.
- E-mail the advertisement to identified professionals.

Phase III: Candidate Review and Selection of Finalists

- Review applications and identify the top 8-12 most qualified semi-finalists.
- Conduct cursory background and reference checks on the top 8-12 most qualified semi-finalists; provide results of background checks in electronic format.
- Interview the top 8-12 most qualified semi-finalists and reduce the field based on this interview process.
- Recommend 4-6 outstanding candidates as semi-finalists for the City to consider interviewing.
- Conduct thorough reference and background investigations on the selected semi-finalists.
 - Note: All background and references checks are to be conducting prior to presenting any recommended candidates.
- Work with the City to select finalists.

Phase IV: Interviews and Selection:

- Coordinate the interview process.
- Once the interviews are completed, provide any additional information the City Manager may require.
- Coordinate the selection of the next Finance Director

IV. Response Form and Content

All responses shall include the following content:

- A. Title Page: Indicate the proposal subject, name of the firm, mailing address, telephone number, name of contact person, email address, and date of submittal.
- B. Introduction: Briefly introduce the firm. Provide a profile of the firm, including, but not limited to, the approximate number of professional staff employed, how long your firm has been in business and how long the firm has been conducting executive searches. Indicate the name of the person(s) who will be authorized to make representation for and bind the firm, the titles of these individuals, and their telephone numbers and email addresses.

C. Proposed process:

1. Briefly state the firm's understanding of the work to be performed. Include, but do not limit, your statement to, the following items that will be included in the Scope of Work.
 - a. Describe the process and/or approach the firm will use to develop the profile for the Finance Director
 - b. Describe the advertising methodologies the firm deems most effective to advertise the City of St. Joseph Finance Director opportunity.
 - c. Describe the approach the firm takes to the direct solicitation of candidates.
2. Describe the firm's proposed strategy to complete the recruitment, including a general statement of the philosophy of the firm and how the firm will tailor the process for St. Joseph's search. Indicate any additional information for consideration of the firm's qualifications.
3. Provide a list of the firm's successful Executive placements in the past 36 months. Include information that demonstrates the firm's experience with seeking a diverse pool of applicants. Provide contact names, telephone numbers, and email addresses of these clients. The City reserves the right to contact any additional individuals or other firms to obtain information about the firm responding.
4. Indicate the names, titles, placement experience, and include resume, of the person(s) who will be assigned to this project. A response to this requirement should include all contact information such as telephone number, fax number, email address, and web address.
5. Provide a firm, fixed fee (i.e., not-to-exceed) including all the firm's expenses for the assignment to help in the selection of the most qualified candidate.
6. Provide a complete description of the fee structure.
7. Provide anticipated timelines for the recruitment and selection process.
8. Describe the firm's warranty for the services it provides.
9. Describe the background and reference checks the firm will undertake for each of the recommended semi-finalists.

V. Questions

During proposal development, respondent's questions regarding the RFP or the process should be directed to Amy Cohorst, Human Resources Director, 1100 Frederick Avenue, Room 403, St. Joseph, Missouri 64501 or via telephone at (816) 271-4670 or via e-mail at acohorst@stjosephmo.gov.

VI. Selection Criteria and Process

A. Evaluation

The City will review and evaluate all proposals based on the criteria noted in this request for proposals and will rely primarily on the proposals submitted in the selection of one or more finalists. Therefore, respondents must emphasize specific information considered pertinent to the project and submit all information requested. Evaluation will be based on the following:

1. Respondent's Overall Qualifications/Experience of the Firm
2. Respondent's demonstrated experience in effective recruitment and selection in similar executive positions
3. Cost of services to be provided by the Firm

All proposals that exceed a threshold cost will be rejected.

B. Teleconference or Presentation

The City may require selected firms to be available to engage in a conference telephone call or attend a virtual meeting to respond to questions.

VII. Guarantee

Should any Finance Director who is chosen utilizing the services of the respondent's firm be terminated for cause or resign within eighteen (18) months of hire, the firm shall be responsible for conducting a replacement search at no charge to the City.

VIII. Standard Professional Services Contract

The selected respondent will be required to enter into a contractual relationship with terms and conditions pursuant to standard contracting procedures of the City of St. Joseph.

IX. Submission of Responses

A. Due Date

Sealed proposal, two (2) complete copies and one (1) electronic copy on a USB drive must be received at the Office of the Purchasing Agent no later than 3:00 p.m., Monday, June 12, 2023. Proposals will not be accepted after this time. Proposals shall be addressed as follows:

Summer Deatherage
Purchasing Agent
1100 Frederick Avenue
St. Joseph, Mo 64501

ATTN: EXECUTIVE SEARCH FIRM (FINANCE DIRECTOR) PROPOSAL ENCLOSED

B. Acceptance/Rejection/Modification to Responses:

The City of St. Joseph reserves the right to negotiate modifications to proposals that it deems acceptable, reject any and all proposals, and to waive informalities or irregularities in a proposal or in the proposal process.

C. Economy of Preparation:

Proposals should be prepared simply and economically, providing a straightforward, concise description of the respondent's ability to fulfill the requirements of the project.

D. Cost of Preparation:

The City shall not be liable for any costs incurred by a respondent in preparing or submitting a proposal.

E. Ownership:

Submitted materials become the property of the City and will not be returned.

F. Public Records:

All responses to this request for proposals will become open public records upon opening of sealed bids.