

**Proposal for
Executive Search and Recruitment Services
For
Executive Director – SFHSS**



October 1, 2024

Submitted By:

Efton Hall, Jr. Sr. Vice President, Healthcare & Public Sector
Berkeley Search Consultants
1990 North California Blvd, 8th Floor #1206, Walnut Creek, CA 94596
E: ehall@berkeleysearch.com
P: 510-898-9308

TABLE OF CONTENTS

Cover Letter	3
Organizational Background and Overview	4
Executive Summary.....	4
Our Services	4
Our Family of Companies.....	4
Key Personnel.....	6
Account Manager/Support Staff.....	6
Our Healthcare / Public Sector Team	6
Team Summary	7
Scope of Work.....	9
Description of Proposed Services	9
Project Approach	9
Sourcing, Media & Communication Strategy.....	12
Diversity and BSC Recruitment	13
Our Process Timeline	14
Past Performance/Relevant Experience.....	15
Successful Searches	15
Representative Placements	19
References	20
Cost Proposal	21
Candidate Travel Reimbursement	21
Guarantee	21
Appendix A – Team Resumes	22

October 1st, 2024

Greetings City & County San Francisco and San Francisco Health Service System Teams,

Berkeley Search Consultants (BSC) is interested in providing Executive Search and Recruitment services to the San Francisco Health Service System (SFHSS), as outlined in this Request for Proposal (RFP) for the Executive Director position.

Our firm has been providing executive search excellence to our clients for over 30 years. You will find BSC featured in the ACHE Career Resource Center, Executive Search Firm Links, which is a privilege only bestowed on the most trusted firms in the industry.

The Senior Vice President of our Healthcare and Public Sector division is Efton Hall, Jr. Efton has over 40 years of experience in the healthcare and public sector industries—over 20 years as a senior level executive and more than two decades spent as an executive search consultant for BSC's healthcare and public sector practice. This combined level of expertise has been an invaluable resource to his team and clients.

Berkeley Search Consultants brings unparalleled expertise and a profound understanding of the healthcare and public sector's needs to the table. Our firm is strategically positioned to partner with SFHSS, employing a meticulous approach that combines in-depth sector knowledge with a commitment to collaboration. This ensures the identification and engagement of leadership talent that not only meets but exceeds the strategic objectives and cultural fit of the team.

For our Key Accounts, Priority and Retained Engagements, we assemble a full team of recruiters, researchers and industry experts who are highly skilled and experienced in tracking down and engaging the local and national markets' top talent in conversation about joining our clients' organizations. Once we have engaged their interest, our team thoroughly vets and screens them to determine their fit for our clients' teams, professionally releasing some from the process and presenting only the best. Most often, the candidates presented by us were not actively seeking new job opportunities and would have continued under their current employment had they not heard from our recruiters.

We have worked with numerous clients across the spectrum of the public sector. We take the time and effort to conduct research and partner with clients, with the goal of understanding and taking into consideration the nuances of each individual position and organization when planning and executing any recruitment project. The success rate of our retained work is nearly perfect, only occasionally disrupted by rare events where course changes were introduced at the client's discretion after the assignment was initiated.

This document reflects Berkeley Search Consultants' commitment to integrity and transparency, ensuring the highest standards are maintained throughout the executive search process. The submission of this letter constitutes a willingness and affirmation of BSC's qualifications to perform the search work for City and County of San Francisco and San Francisco Health Service System. We warrant that all data submitted is true and complete. Thank you again for considering Berkeley Search Consultants for your talent acquisition needs.

All the best,



Mark Howard, President & CEO

ORGANIZATIONAL BACKGROUND AND OVERVIEW

Executive Summary

Berkeley Search Consultants is a full-service executive search and placement firm that has been collaborating with clients in the Public Sector, Healthcare, Consumer-Packaged Goods (CPG), Financial Services, and Technology industries since 1989. We believe a successful search is all about personal connections and relationships. There are many options out there that claim to be the silver bullet, but they simply are not working.

Within our business, we understand that the best candidates are contacted directly on a personal basis – they are not monitoring job boards and clicking on banner ads for their next great opportunity. We know this because we have taken a close look at our proudest placements over the years and in most cases, the winning candidate was not actively seeking a new job, but rather happily performing in their current role before a member of our team shared a better opportunity. You cannot accomplish that in an email, LinkedIn message or text alone.

BSC is based at 1990 N. California Blvd, Walnut Creek, CA, and operates with a team of 15 professionals. This strategic alignment ensures we are well-positioned to undertake the City and County of San Francisco and San Francisco Health Service System project, leveraging our specialized healthcare and public sector team for targeted success.

Given BSC's specialized healthcare and public sector team, this project aligns seamlessly within our organizational structure. This dedicated team brings deep expertise and a tailored approach to meet the unique challenges and requirements of projects within these sectors.

Our Services

Berkeley Search Consultants offers search services on a retained, engaged, and interim basis determined by client needs. We offer a comprehensive range of related search and placement services including relocation consultations, candidate and job profiling, reference checking, degree verification, and background checking if requested. Our thorough and holistic approach through the entire full cycle recruitment process ensures that our clients are exposed only to top-flight talent.

Our brand reflects the personal touch necessary in recruiting the best matches for our clients in terms of experience and cultural fit. We have retooled our services to highlight our retained and engaged offerings. This is where we do our best work, and retained and engaged searches now constitute most of our search work. We take the necessary time with candidates to vet their genuine interest and ensure they are the right fit. Taking care to cover every detail, we elevate the probability of a successful search outcome.

Our Family of Companies

Berkeley Search Consultants is a proud member of the Sanford Rose Associates® network of offices. The Sanford Rose Associates® family of companies is ranked and recognized as a Top 10 Retained Search Firm by Executive Search Review and is noted in Forbes as one of America's Best Professional Recruiting firms.

With over 130 offices worldwide, Sanford Rose Associates® is a network of independently owned and operated recruiting offices in its 60th year of offering executive search services. Our network specializes in retained search for experienced executives, managers, and individual contributors. We work on behalf of our client companies to search for and recruit highly qualified professionals.

Key Firm Statistics



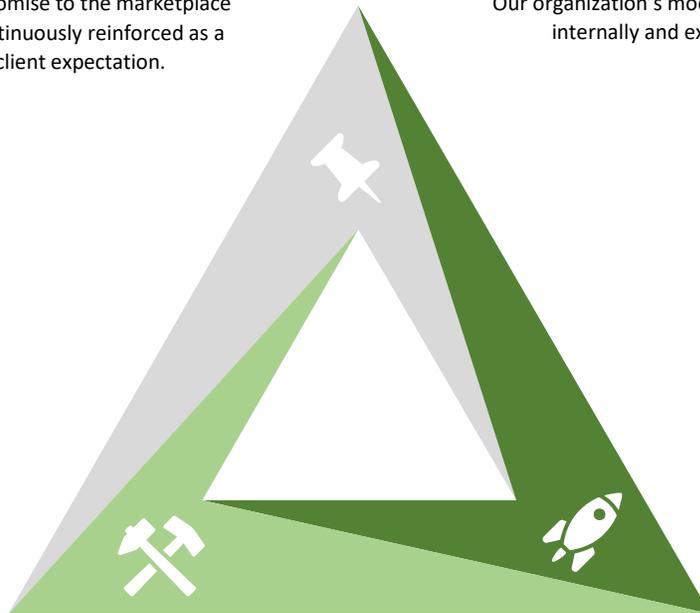
Our Core Values

VALUE ADDED BEFORE VALUE RECEIVED

Our firm's promise to the marketplace which is continuously reinforced as a basic client expectation.

TEAMWORK BEFORE INDIVIDUALISM

Our organization's mode of operation internally and externally.



RELATIONSHIPS BEFORE TRANSACTIONS

Our firm's fundamental approach to business. Our organizational ethics of Honesty, Sincerity, Transparency, and Respect will be honored, without question, in all internal and external interactions.

KEY PERSONNEL

Account Manager/Support Staff

- **Dedicated Primary contact:** Julia Morse - jmorse@berkeleysearch.com
- **Dedicated Account Manager:** Efton Hall, Jr. - ehall@berkeleysearch.com

Our Healthcare / Public Sector Team

- **Project Manager, Efton Hall, Jr.**

Will provide overall project management, client liaison, candidate vetting and subject matter expertise.

- **Executive Team member, Mark Howard**

Will provide quality control and administrative oversight.

- **Senior Recruiter, Laura Ayers**

Will conduct research, source, and manage qualified candidates through the recruitment process.

- **Project Recruiter, Roger Bazan-Flores**

Will conduct research, source, and manage qualified candidates through the recruitment process.

Berkeley Search Consultants (BSC) asserts that it is a San Francisco Bay Area executive search firm with over 30 years of experience.

BSC has:

- A competent and professional staff and project team.
- Extensive experience recruiting executive staff for local governments.
- Success in helping local government agencies identify recruitment objectives.
- Experience identifying various candidate pools and conducting background and reference checks.
- Success in developing an executive outreach campaign.
- Experience developing and conducting interviews.
- Success in negotiations with potential candidates.

The BSC Public Sector/Healthcare practice is led by Efton Hall, Jr., a former public sector executive with a wealth of recruitment knowledge and experience. Efton spent 20+ years as a C-level executive building both public and private organizations. Over his 20+ years as an executive recruiter, Efton has placed executives from directors to CEOs. Efton leads a highly respected team of experienced recruiters who combined have nearly two decades of recruiting experience. The team has successfully placed executives in organizations across the county. Recent successes include:

- Chief Medical Officer / Medical Director - Laguna Honda Hospital – City & County of San Francisco
- Nursing Administrator - Laguna Honda Hospital – City & County of San Francisco
- County Administrator – Harris County (Texas)
- Director, Child Welfare Services – County of Santa Cruz

Team Summary

Efton Hall, Jr.

Efton has an unparalleled track record as a proven executive with 20 years of executive search experience and 20 years of experience as a senior executive, including 13 years in a California Healthcare District. He has held C-level positions in both public and private institutions. With Efton's broad knowledge and experience in the public and private sector, our clients can be confident in his ability to meet their senior leadership talent acquisition needs. His attention to detail, strong planning skills and subject matter expertise contribute to the successful completion of any assignment that we undertake. Efton has a bachelor's degree from Stanford University and a master's degree in public health, emphasis on Healthcare Administration from the Earl Warren School of Public Health, University of California, Berkeley.

Efton is a former Board member of the California Association of Healthcare Leaders, where he chaired the Career Development and Transition Committee. Efton has participated in the planning and outreach to several diversity groups at the national and regional levels, both through membership, organizing and leadership activities. Through these efforts, he has positioned BSC to have linkages and recruiting resources into all the major diversity groups, which has translated directly into our ability to establish diverse candidate pools.

Mark Howard

In his capacity of President and CEO of Berkeley Search Consultants, Mark oversees initiatives to grow the business and directs resources on retained projects for the firm. He manages the new hire and training functions and is also the co-manager of the Financial Services Division where he continues to develop partnerships with key accounts.

Mark began with the firm in 1998 and has contributed to the development of the Financial Services Division. As an Account Manager, Mark achieved Pacesetter Status, ranking him among the top recruiters in the industry.

Julia Morse

Julia is one of our team's top recruiting professionals. She has worked across many disciplines and has excelled at engaging top performers. Julia is adept at finding exceptional candidates and getting them excited about new opportunities. She has a background in sales and marketing. Julia leverages this experience to make new and valuable connections with talented professionals.

Julia specializes in identifying, recruiting, and vetting top-level candidates for placement in the public sector and healthcare roles nationwide. So far, Julia has been able to fulfill the search needs of every retained assignment she has worked on, finding candidates to satisfy all her key clients. Julia graduated from the University of California, Davis with a B.A. in English.

Laura Ayers

Laura is a Senior Recruiter on the Healthcare and Public Sector team at Berkeley Search Consultants; Laura supports the practice by sourcing and engaging top talent for various searches. She brings strong insight and experience to the practice through her background working in the public health, healthcare, and behavioral health fields.

Laura provides valuable support through analyzing qualified prospects across the nation and helping to screen, assess, and coordinate the recruitment process. She is a strong communicator and has proven ability to contribute assistance in several areas of the practice including client and candidate correspondence, market research, and business development. Laura graduated from the University of California, Davis with a B.S. in Managerial Economics and Minor in Public Health Sciences.

Roger Bazan-Flores

Rogelio (Roger) Bazan-Flores launched his professional career as a Recruiter with Berkeley Search Consultants in 2023 and works with the Healthcare & Public Sector Practices. Roger comes from a background in Healthcare and the Public Sector himself, including positions with County of Los Angeles' Department of Mental Health, City of Los Angeles' Economic & Workforce Development Department, University of California, and several nonprofits. With his drive for health equity and community centered approaches, he assists the team with research, recruitment, and support to find the best candidates who meet client expectations.

Roger graduated from the University of California, Los Angeles (UCLA) in 2021, getting his B.S. in Environmental Science and with the desire to further develop as a professional. Roger promptly moved to Oakland, CA to obtain his Master of Public Health degree from the University of California, Berkeley in 2023.

****See Appendix A for resumes***

SCOPE OF WORK

Description of Proposed Services

As part of the executive search process, in addition to regularly scheduled meetings, the BSC recruitment team will supply the City and County of San Francisco and San Francisco Health Service System with a variety of tools and documents to exchange and provide updated information on the search as it progresses. The documents include, but are not limited to:

- The Needs Analysis Profile
- Recruitment Job Related Document Request
- Recruitment Schedule (updated regularly)
- Recruitment Metrics (updated regularly)
- Candidate Matrix or Candidate Summaries
- Candidate Document Packet

Project Approach

We would provide Executive Search services according to our process outlined below.

Phase 1 – Initialize the Search

Step 1: Prior to any search, BSC conducts comprehensive market reconnaissance. We diligently investigate the local market and candidate landscape, providing invaluable insights into factors such as salary trends, location considerations, and candidate availability, ensuring an informed personally tailored and effective recruitment strategy for the SFHSS.

Step 2: We develop and define requirements for the search.

We will meet with you to take an in-depth Needs Analysis Profile (NAP). This will cover position requirements, urgency, roles & responsibilities, attributes, skill sets, accountabilities, benefits, and compensation. We will define what an “A” player means to your organization and ask key questions to fully understand the company mission, culture, organizational structure, key initiatives, etc. We will interview key stakeholders, develop Position Specifications and Search Schedule for your review and approval. This step ensures an inclusive process and a transfer of knowledge to promote a qualified, diverse candidate pool. This is essential to facilitate the overall selection process effectively. During this meeting, we will engage in detailed discussions to develop candidate criteria that include specific experience and strengths, ensuring alignment with the county's strategic needs. Additionally, we gather comprehensive details regarding the compensation and benefits package to be offered. Following our comprehensive Needs Analysis Profile meeting with the SFHSS Team, BSC crafts a set of tailored criteria that serve as benchmarks for assessing each candidate's resume, cover letter, and supplemental documents. This criteria-based assessment framework is designed to ensure a thorough and unbiased evaluation of each applicant's qualifications in relation to the Executive Director position.

BSC will request a list of all prior applicants, prior interviewees, and any candidates previously engaged by the client in the recruitment before BSC's involvement. BSC will screen all prior candidates previously engaged by the client and support them through any future process steps alongside all BSC recruits.

Step 3: We brief our team and create a search strategy.

Each member of the search team is oriented to the agreed upon objectives of the project and the information gathered in the NAP. We create a comprehensive search plan, including:

- Compose a job description based on the information you have provided us regarding the position.
- Identifying compatible organizations that would have the type of talent you require and create a Target List of those organizations to source from.
- Compile a targeted list of other sources most likely to identify appropriate candidates. These sources may include networking with industry contacts, executive level contacts, our database, internet research, sourcing and name gathering calls.
- Develop a Recruiting Presentation that establishes an accurate employer brand while representing your organizations and key characteristics about the opportunity. This presentation will be sure to address the elements that are most important to you about the position and is designed to attract the “right fit” candidates. BSC is able to develop comprehensive brochures in close collaboration with the SFHSS Hiring team. These brochures are tailored for each specific recruitment project, encompassing critical information about the community, the hiring organization, the relevant department, the Executive Director role and compensation details.

Phase 2 – Implement the Search

Step 1: We identify potential candidates.

The search team takes your message to the market, contacting targeted candidates on our source list. To execute this stage, we use a combination of tools including our own and industry-specific database, social media, and other available technologies and venues. We reach out to those contacts utilizing extensive telephone calling efforts, email campaigns, and advertising.

Step 2: We interview and qualify candidates.

We will assess each candidate’s credentials, motivations, career objectives and achievements based upon the requirements you provided at the initial phase. To fully vet each candidate, we will interview them thoroughly, during which time we will qualify the candidates’ compensation, skills, accomplishments, background check etc. before presenting them to you.

Phase 3 – Select the Candidates

Step 1: We present a list of candidates.

Based on the agreed upon search schedule, we will present you with a group of potential candidates summarizing the important information about them.

BSC will incorporate all candidates previously engaged by the client in the recruitment process. BSC will screen them, support them and represent them to the client alongside candidates that enter the process because of BSC outreach and recruitment.

Step 2: We manage the client/candidate interviews.

We will assist with the coordination of the interview process, including pre- and post-interview briefings with both the candidate and the Search Committee. It is important that you always provide us with open and honest feedback as we continue to work hard to bring you the candidate you want for the position.

Step 3: We help you select the final candidates.

We will consult with you to narrow down the candidates into a “short list”. We will constantly be addressing any issues that may arise throughout the process that could create a roadblock.

Step 4: We check references. We will conduct in-depth professional references and obtain verification of any pertinent education and/or licenses listed on the resume and required for the position. We consult with several different contacts at the appropriate phase in the process.

Step 5: We conduct pre-offer preparation.

We will reconfirm compensation requirements, address counteroffer, and start date availability with the candidate. We will also confirm the candidate's commitment to the opportunity to ensure that if the offer is extended and correct that it will be accepted.

Phase 4 – Extend the Offer Informally

Step 1: We present the offer to the candidate.

Initially, we will present all the components of the offer on an informal basis, including compensation, benefits, title, reporting structure and start date. When the candidate has verbally indicated their willingness to accept the offer, we will advise you to formalize the offer in writing.

Step 2: We facilitate any negotiation.

We assist in securing the final agreement of terms.

Step 3: We get a formal acceptance of the offer.

We will obtain a signed offer letter.

Step 4: We follow up with your new hire.

We track the progress of the candidate's resignation through their first day of employment with you.

Phase 5 – Follow up After the Placement

Step 1: We continue to follow up with both you and the new hire.

We will contact the candidate and you on the candidate's first day, two weeks after the start date and 30 days after the start date to ensure successful integration into the new environment and to address any concerns. We stay in contact on an agreed upon schedule for the first year and thereafter on an as needed and on-call basis.

Step 2: We help resolve issues if necessary.

If there is an issue, the three of us (you, the candidate and us) will work to resolve that issue together.

How BSC will work with The City and County of San Francisco and SFHSS

A sound process is key to finding and securing top talent. After nearly three decades of experience and thousands of successfully completed searches, we know how to find and recruit talent and help you achieve superior results during the interview, hiring and onboarding phases. Our proven process is fast and efficient.

Following the launch of our search process, we commit to maintaining open and consistent communication with the San Francisco Health Service System through scheduled weekly or bi-weekly team meetings. These meetings are designed to provide updates, discuss progress, and address any immediate concerns or adjustments needed in our recruitment strategy. This approach ensures that the SFHSS remains closely involved and informed throughout each phase of the recruitment process, fostering a collaborative partnership that aligns with our comprehensive strategy for working with SFHSS.

Quality Control

Berkeley Search Consultants is dedicated to delivering high-quality talent to the San Francisco Health Service System, underscored by our rigorous quality control plan. Our approach integrates best practices, thorough processes, and innovative strategies to ensure that only the most qualified candidates are presented. As part of our commitment to quality, we incorporate several key elements into our vetting process.

First, BSC will engage in comprehensive intake and evaluation methodologies tailored to the specific needs of the San Francisco Health Service System. This includes a series of assessments designed to gauge the candidates' skills, competencies, and compatibility with the SFHSS's work culture and values. By conducting these assessments, we gain in-depth insights into the candidates' abilities, ensuring a match not only in qualifications but also in ethos and work style. Additionally, BSC works closely with the SFHSS Team to customize these testing protocols, ensuring they are directly aligned with the Executive Director role outlined in the project. This collaboration allows us to refine our selection process continually, adapting to the SFHSS's evolving needs and preferences.

Our quality control doesn't stop at testing; it extends to continuous monitoring and feedback mechanisms throughout the recruitment process. We will maintain open lines of communication with specifically the SFHSS hiring team, facilitating regular check-ins and updates. This enables us to adjust our strategies in real time, ensuring that the recruitment process remains aligned with the SFHSS's expectations and project milestones.

Sourcing, Media & Communication Strategy

Berkeley Search Consultants (BSC) employs a multifaceted media and communication strategy designed to maximize the visibility of the search process and attract a diverse array of highly qualified candidates. Our approach integrates traditional and digital media platforms, along with targeted messaging and direct outreach, to engage potential candidates and stakeholders effectively.

The first place we begin each search is with our confidential database and network. This rich resource is continually updated and curated to include a wide range of professionals across various sectors, enabling us to quickly identify potential candidates who meet the specific criteria and qualifications required for the position.

Our website serves as a central hub for information on current searches, offering detailed descriptions of opportunities, insights into the communities and organizations we serve, and testimonials from past successful placements. This platform is optimized for search engines to ensure high visibility for our search listings.

In addition to our website, we utilize both general and specialized job boards to post opportunities. This dual approach allows us to cast a wide net while also targeting professionals in specific sectors or with niche expertise. Our experience has shown that specialized job boards are particularly effective for reaching candidates with the unique skill sets required for this Executive Director role.

Local, regional and national associations play a crucial role in our strategy, providing a conduit to reach professionals deeply embedded within specific communities or sectors. By collaborating with these associations, we can tap into their networks, leveraging their credibility and reach to engage potential candidates who may not be actively searching for new opportunities but are open to compelling prospects.

Social media platforms, particularly LinkedIn, are integral to our communication strategy. We ensure that each search is accompanied by at least two dedicated postings on LinkedIn, designed to highlight the unique aspects of the opportunity and the community it serves. These posts are crafted to engage potential candidates and encourage sharing within

professional networks, amplifying their reach. Additionally, our team actively uses LinkedIn InMail to initiate direct conversations with prospective candidates, providing a personal touch to our outreach efforts.

Prospecting via email and phone constitutes a critical component of our strategy, allowing for personalized outreach to candidates identified through our sourcing efforts. This direct communication is tailored to each search, highlighting the opportunity's specific appeal and how it aligns with the candidate's career aspirations and professional expertise.

By combining these diverse channels and strategies, BSC ensures that our search process is transparent, inclusive, and capable of attracting the best talent from local, national, and even international pools. Our media and communication strategy are not static; it is continuously refined based on the feedback from stakeholders and the evolving landscape of media and professional networking, ensuring that we remain at the forefront of executive search best practices.

Diversity and BSC Recruitment

Berkeley Search Consultants has promoted racial and gender equity through its selection of clients by refusing to partner with any organization who subscribes to or promotes bias and inequity vis a vis their hiring practices. In the current decade, all clients, without exception, that BSC engages with are requesting diverse candidate pools comprised of candidates who have experience leading a diverse workforce and serving a diverse community. It is the practice and philosophy of BSC to start every search in the local community of our client in order to enhance the possibility of acquiring talent that reflects the community and is cognizant of the culture and nuance of said community. Inevitably the search is enriched by radiating out, often nationally, in search of the most talented individuals to fill a particular position. Examples of recent searches where the client expressed a clear interest in having a diverse candidate pool and pulling from a national stage were:

- Harris County, Houston Texas, Executive Director, Health, and Human Services
- Medical Director, Mecklenburg County Department of Public Health
- City and County of SF, Department of Public Health, Director
- Marin County, Director, Health, and Human Services
- City and County of SF, Department of Public Health, Director of Behavioral Health Services/ Mental Health San Francisco

Each of these clients had a clear and non-negotiable demand to hire a candidate who had a strong track record in diversity, equity, and inclusion.

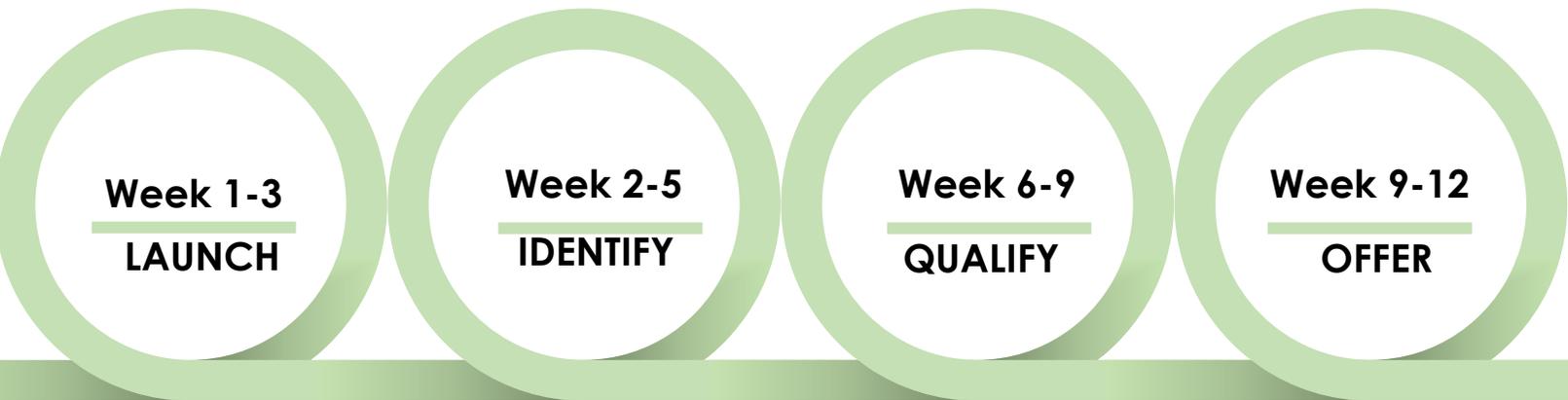
Berkeley Search Consultants strategically partners with organizations and associations dedicated to promoting diversity within local government leadership. Our collaboration extends to diverse employee associations and leadership organizations that align with the specific needs and focus of each recruitment project. By leveraging these partnerships, BSC effectively utilizes their platforms for outreach and promotion for the Executive Director role. This targeted approach ensures that the opportunity reaches a broad spectrum of potential candidates from various backgrounds and experiences, thereby enriching the candidate pool with individuals who bring diverse perspectives to local government leadership. These partnerships are instrumental in our efforts to attract talent that reflects the community's diversity, fostering an inclusive and representative local government structure.

Efton Hall, Jr., BSC's lead for this project, has participated in the planning and outreach to several diversity groups at the national and regional levels, both through membership, organizing and leadership activities. Through these efforts, he has positioned BSC to have linkages and recruiting resources into all the major diversity groups, which has translated directly into our ability to establish diverse candidate pools. BSC is committed to diversity not only in recruitment but also within our own team. We are proud to be an organization with members from diverse backgrounds, working together and honoring what everyone brings to the table. <https://berkeleysearch.com/who-we-are/>

Our Process Timeline

This following diagram serves as a basic overview of a typical recruitment schedule. This diagram outlines the key activities and milestones essential to the recruitment process, from the initial search kickoff to the final placement and onboarding of the candidate. It's important to note that each recruitment project possesses its own unique set of requirements and challenges. As such, the detailed schedule and the personnel assigned to various tasks will be carefully adjusted according to the specific needs of the project.

Our approach is designed to not only meet but potentially improve upon the SFHSS’s hiring timeframes, maximizing efficiency and providing the best value. We achieve this through meticulous planning, constant communication, and adaptive project management practices. Our schedule includes controls to ensure that the project remains on track and within budget, incorporating checkpoints for review and adjustment as needed. This flexibility allows us to respond promptly to any unforeseen changes or challenges, ensuring minimal impacts on the public and a seamless hiring process for the City and County.



LAUNCH

Collaborate closely with clients to develop and define requirements for the search(es) at hand.

Co-create with SFHSS Team and internal recruiting team a solid search strategy and marketing plan including brochure.

Develop a project timeline with clearly defined deliverables, objectives & metrics.

IDENTIFY

Leverage numerous recruiting resources, beginning with networking, to identify and target a pool of qualified potential candidates.

Connect, gauge interest and motivations and conduct initial candidate interviews.

QUALIFY

Present to client a short list of highly qualified candidates.

Facilitate and manage the entire client- candidate interview process.

Upon selection of a finalist candidate, BSC conducts professional reference checks, verifies education, and conducts any pre-offer preparation.

OFFER

BSC presents offer to candidate.

Facilitate any negotiations.

Obtain candidate’s formal acceptance of the offer.

BSC follow up with new hire before and after

Plan of Operation

Understanding that each recruitment project carries its unique set of requirements and challenges, BSC customizes its approach for every assignment. While we maintain a general outline for the recruitment process to ensure consistency and efficiency, modifications are made as necessary to tailor our methods to the specific needs of each project. This flexibility allows us to adapt our strategies to best meet the objectives and timelines set forth by the SFHSS Team, ensuring a recruitment process that is both effective and efficient.

Regarding budget management, BSC integrates the budget into the overall plan from the outset, allowing for a holistic view of project resources alongside timelines and workload. This integrated approach ensures that we maintain financial oversight throughout the project lifecycle, without the need for allocating budget separately for each workload or team member.

By intertwining schedule management with tailored recruitment strategies and integrated budget planning, BSC provides a robust framework for project execution. This methodology ensures that we not only meet but exceed our clients' expectations, delivering high-quality outcomes through efficient and effective project management practices.

PAST PERFORMANCE/RELEVANT EXPERIENCE

Successful Searches

BSC has been providing executive search services for over 30+ years. Most recently, BSC has had the pleasure of providing executive search services to distinguished public sector organizations across the country.

BSC has demonstrated experience recruiting executive talent to the City and County of San Francisco and other large public sector organizations for leadership roles across various areas public sector leadership. Below are some descriptions of our search work in the public sector. Below is a sample of some of BSC's successful recruitments over the past few years.

C-Suite and/or Executive Leadership Examples

Company Name: San Francisco Health Service System

Recruited Position: Chief Operating Officer

Contract type; time period: Retained Search / November 2021 – March 2022

Brief Description of work or scope of services provided:

Berkeley Search Consultants was retained by the San Francisco Health Service System (SFHSS) to conduct a search for a **Chief Operating Officer**. The SFHSS serves the over 130,000 employees, retirees, and their covered dependents of the City and County of San Francisco, providing health benefits (including medical, dental, and vision.) and other benefits including group-term life, short-term disability, accident, critical illness, and other voluntary benefit insurance options. Reporting to the Executive Director, the COO is responsible for the administration of all aspects of the day-to-day operations of the Health Service System as well as assisting in the long-range planning and implementation of best-in-class benefits and benefits administration. After a nationwide search, a California leader in public benefits systems was selected for the role. BSC continues to receive positive feedback on the COO and his endeavors.

Company Name: City & County of San Francisco

Recruited Position: Nursing Home Administrator, Laguna Honda Hospital

Contract type; time period: Retained Search / February 2023 – June 2023

Brief Description of work or scope of services provided:

Berkeley Search Consultants has been retained by City & County of San Francisco's Department of Public Health to conduct a search for a **Nursing Home Administrator** for Laguna Honda Hospital. Laguna Honda Hospital and Rehabilitation Center (LHH) is one of the nation's largest skilled nursing facilities with over 750 residents. The Nursing Home Administrator functions as the top executive for Laguna Honda Hospital and Rehabilitation Center (LHH) and is responsible and accountable for all functions and activities of LHH. Reporting to the Director of the San Francisco Health Network, the Nursing Home Administrator leads, guides, and directs the operations of the healthcare facility in accordance with local, state, and federal regulations, standards and established facility policies and procedures to provide appropriate care and services to residents. After an extensive recruitment, BSC presented the hiring team with a slate of fifteen highly qualified candidates. From this slate, a highly regarded Nursing Home Administrator (NHA) was selected as the top ranked finalist and started with Laguna Honda at the end of June 2023. In their short time at Laguna Honda, the new NHA has received favorable reviews from leadership and had a major regulatory win for the facility.

Company Name: City & County of San Francisco

Recruited Position: Chief Medical Officer, Laguna Honda Hospital

Contract type; time period: Retained Search / March 2023 – October 2023

Brief Description of work or scope of services provided:

Berkeley Search Consultants has been retained by City & County of San Francisco's Department of Public Health to conduct a search for a **Chief Medical Officer** for Laguna Honda Hospital. Laguna Honda Hospital and Rehabilitation Center (LHH) is one of the nation's largest skilled nursing facilities with over 750 residents. The Nursing Home Administrator functions as the top executive for Laguna Honda Hospital and Rehabilitation Center (LHH) and is responsible and accountable for all functions and activities of LHH. Reporting to the Nursing Home Administrator, the Chief Medical Officer functions as a top executive for Laguna Honda Hospital and Rehabilitation Center (LHH) and is the top senior level executive responsible for medical. This position is the accountable leader for medical care standards, coordination, surveillance and plans for improvement for the entire facility. After a nationwide recruitment, a California leader in long term care medicine was identified as the top-ranked candidate. The physician leader joined the team in December 2023 and BSC has received favorable reviews from the leadership.

Company Name: Community Medical Centers – Clovis, CA

Position: Senior Vice President/Chief Financial Officer

Contract type; time period: Limited Sourcing Project / March 2023 – October 2023

Brief Description of work or scope of services provided:

Berkeley Search Consultants partnered with Fulcrum Methods who was retained by Community Medical Centers to complete a recruiting project for a **Senior Vice President/Chief Financial Officer** role. The healthcare system includes four acute, secondary, and tertiary hospital-based campuses among other healthcare facilities, including a residency and teaching relationship with a prestigious medical school program. Reporting to the Chief Executive Officer, the SVP Chief Financial Officer plays an essential role in directing all financial activities of the health system. The SVP Chief Financial Officer also serves as essential leadership, in collaboration with the executive team, physician leadership and line management, to achieve operational and financial performance objectives.

including revenue growth, operational margin improvement, effective expense management, overall efficiency of operations, joint venture and related entity performance, and asset management.

Berkeley Search Consultants conducted a nationwide search and recruited top CFOs from across the country. After an extensive search, the team was able to present the client with a slate of 6 highly qualified candidates to interview. The project was completed on time and within budget.

Organization Name: City & County of San Francisco, CA

Recruited Position: Chief Financial Officer, ZSFG San Francisco General (ZSFG)

Contract type; period and amount: Retained Search; May 2017 – September 2017

Brief Description of work or scope of services provided:

Berkeley Search Consultants was retained to conduct a search for a Hospital **Chief Financial Officer** (CFO) position at Zuckerberg San Francisco General (ZSFG) in San Francisco, California. The Hospital CFO, in collaboration with the health system level CFO, provides leadership and oversight in the planning and integration of financial services, including financial management, budget, accounting and revenue cycle. This position is directly involved at the executive level in strategic, operational, and business decisions for the 3,000 plus FTE hospital entity. Berkeley Search Consultants conducted a nationwide search and recruited top public health officials from across the country. After an extensive search, the team was able to present the client with a slate of 12 highly qualified candidates to interview. A highly respected financial leader was selected for the role. The CFO has been a strong addition to the leadership team and BSC has received many accolades for this hire.

Department Leadership Examples

Company Name: City & County of San Francisco, Department of Public Health,

Recruited Position: Director of Health Information Services [ZSFG]

Contract type; period and amount: Retained Search; May 2023 – present

Brief Description of work or scope of services provided:

Berkeley Search Consultants was retained to conduct a search for a **Director of Health Information Services** for San Francisco's Department of Health. Under the direction of the Zuckerberg San Francisco General Hospital [ZSFGH] Financial Officers, the Director of Health Information Services (HIS) plans, supervises, coordinates, and manages the operations and activities required to ensure uninterrupted day-to-day operations of the SFDPH Health Information Services (HIS) Department. The Director of HIS manages approximately 110 employees providing technical and-clerical health record services for inpatient/trauma admissions, outpatient visits, behavioral health services, skilled nursing facility services, jail health services, population health and other services across City and County of San Francisco. After a nationwide search, sixteen highly qualified candidates were recruited for the role. The interview process is underway, and a finalist should be identified in the next few weeks.

Organization Name: City and County of San Francisco, Department of Public Health

Recruited Position: Director of Managed Care, Behavioral Health

Contract type; time period: Retained Search / March 2022 – August 2022

Brief Description of work or scope of services provided:

San Francisco Department of Public Health retained Berkeley Search Consultants to conduct a search for a **Director of Managed Care - Behavioral Health**. The Director of Managed Care for Behavioral Health (BHS) functions at the executive level of BHS management and is responsible for all functions and activities of Managed Care, a major section within BHS. This position is responsible for providing leadership and direction in developing new programs and establishing organizational policies, priorities, and objectives. This role is also responsible for ensuring compliance with all state regulatory requirements and contractual requirements under the Mental Health Plan and the Drug Medi-Cal Organized Delivery System contracts with the Department of Health Care Services. The

finalist identified after an extensive search process is a former Deputy Director of Behavioral Health with Alameda County). The new director started his work with the San Francisco Department of Public Health in November 2022.

Organization Name: City and County of San Francisco, Department of Public Health

Recruited Position: Director, Behavioral Health and Mental Health San Francisco

Contract type; time period: Retained Search; August 2020 – December 2020

Brief Description of work or scope of services provided:

Berkeley Search Consultants was retained by City & County of San Francisco's Department of Public Health to conduct a search for a **Director, Behavioral Health Services and Mental Health SF**. Reporting to the Director of Public Health, the Director, Behavioral Health and Mental Health SF provides vision, strategic direction, and administrative leadership for addressing mental health and substance use disorders for people in San Francisco. The network the position oversees consists of a delivery system of civil service staff of 600, a Private Provider Network of approximately 250 individual providers, and 200 community-based programs operated by non-profit partners. The overall budget is approximately \$450 million. BSC conducted a nationwide search, directly vetting over 140 behavioral health leaders from across the country and presenting a slate of 17 highly qualified candidates to the hiring committee for consideration. After three stages of interviews, this resulted in the selection of Dr. Hillary Kunins, then Executive Deputy Commissioner for Mental Hygiene for the New York City Department of Health and Mental Hygiene. Dr. Kunins is still in her role today, and we have received positive feedback from the client on her performance.

Company Name: City & County of San Francisco

Recruited Position: Director, Public Health

Contract type; time period: Retained Search; October 2018 – January 2019

Brief Description of work or scope of services provided:

Berkeley Search Consultants was retained by City & County of San Francisco's Department of Public Health to conduct a search for a **Director of Public Health**. Under broad policy direction the Health Commission and the Mayor, the Director of Public Health plans, organizes, and directs all functions and activities of the Department, including hospitals, preventative health services, emergency medical services, environmental health, and other population health functions. The Director is responsible for a \$2.2 billion budget, an 8000+ employee department, as well as the administration of \$400 million in health services contracts. Additionally, the Director of Public Health directs the enforcement of all public health laws, ordinances and regulations; oversees budget preparation for approval of the Commission; establishes and maintains community and professional interest in public health matters; and develops policies and programs to address the needs of SF Department of Health and the health of the community. After a nationwide search, a highly respected public health leader was selected for the role and remains in the role today.

Company Name: City and County of San Francisco, Department of Public Health

Recruited Position: Director, Infection Prevention and Control

Brief Description of work or scope of services provided:

The San Francisco Department of Public Health retained Berkeley Search Consultants to lead the search for their new **Director, Infection Prevention & Control** position. Desirable experience for the role included CIC (Certification of Infection Prevention and Control) and experience managing multiple Infection Prevention and Control (IPC) programs. The position directs the operations and staff of the Infection Prevention and Control (IPC) program. The Director also coordinates and manages the IPC professional services and standards of practice across various levels of healthcare within the San Francisco Health Network, including acute care, post-acute care,

behavioral health, ambulatory care, and rehabilitation services. The search concluded and a master prepared RN was identified as the top ranked candidate and joined the department and continues to contribute to the team.

Company Name: City & County of San Francisco, Department of Public Health

Recruited Position: Director, Health Information Management Services

Contract type; period: Retained Search; July – December 2024

Brief Description of work or scope of services provided:

Berkeley Search Consultants was retained to conduct a search for a **Director of Health Information Management Services** for San Francisco's Department of Public Health. The Director of Health Information Management Services plans, supervises, coordinates and manages the operations and activities required to ensure uninterrupted day-to-day operations of the Health Information Services (HIS) Department for the entire county department of health. Under the direction of the Zuckerberg San Francisco General Hospital [ZSFGH] Financial Officers, the Director of Health Information Services (HIS) plans, supervises, coordinates, and manages the operations and activities required to ensure uninterrupted day-to-day operations of the SFDPH Health Information Services (HIS) Department. The Director of HIS manages approximately 110 employees providing technical and clerical health record services for inpatient/trauma admissions, outpatient visits, behavioural health services, skilled nursing facility services, jail health services, population health and other services across city and county of San Francisco. After an extensive nationwide search, the team was able to present the client with a slate of sixteen highly qualified candidates to interview. The result was the selection of a California HIM leader with 20+ years of HIM experience, including experience with one the nation's largest health organizations. The new leader has joined the team and both staff and leadership have shared positive reviews of the new HIM leader.

Representative Placements

Since 1989, Berkeley Search Consultants has made over 1500 placements. Below is a list of completed placements that demonstrate BSC's experience in the recruitment of public sector executive positions.

<i>Director, Substance Use Services</i>	<i>Santa Clara County, CA [ACTIVE]</i>
<i>Deputy Director, Behavioral Health (Project)</i>	<i>Santa Clara County, CA [2024]</i>
<i>Assistant Director, Child Welfare Services</i>	<i>Santa Cruz County, CA [2024]</i>
<i>District Health Officer</i>	<i>Northern Nevada Public Health [2024]</i>
<i>County Administrator</i>	<i>Harris County, TX [2023]</i>
<i>Director, Public Works</i>	<i>City & County of San Francisco, CA [2023]</i>
<i>Medical Director [LHH]</i>	<i>City & County of San Francisco, CA [2023]</i>
<i>Director of Nursing [LHH]</i>	<i>City & County of San Francisco, CA [2023]</i>
<i>Director, HIMS [DPH]</i>	<i>City & County of San Francisco, CA [2023]</i>
<i>(2) Asst. Nursing Home Administrator [LHH]</i>	<i>City & County of San Francisco, CA [2023]</i>
<i>Director, Child Welfare Services</i>	<i>Santa Cruz County, CA [2023]</i>
<i>Deputy County Administrator</i>	<i>Harris County, TX [2022]</i>
<i>Deputy Chief Medical Examiner</i>	<i>Harris County, TX [2022]</i>
<i>Medical Director, Public Health</i>	<i>Mecklenburg County, NC [2022]</i>
<i>COO – SF Health Service System</i>	<i>City & County of San Francisco, CA [2022]</i>
<i>Compliance Officer</i>	<i>Harris County, TX [2022]</i>
<i>Asst. Director, Public Health Laboratory</i>	<i>Riverside County, CA [2022]</i>
<i>Chief Equity Officer - HSH</i>	<i>City & County of San Francisco, CA [2021]</i>
<i>Assistant Director, Population Health</i>	<i>Mecklenburg County, NC [2021]</i>
<i>Assistant Director, Clinical Services</i>	<i>Mecklenburg County, NC [2021]</i>
<i>Assistant Director, Human Services</i>	<i>Santa Cruz County, CA [2021]</i>
<i>Deputy Public Health Officer</i>	<i>Riverside County, CA [2021]</i>
<i>Deputy Director, Administration</i>	<i>Riverside County, CA [2021]</i>

<i>Behavioral Health Commissioner</i>	<i>State of Colorado [2020]</i>
<i>Director, Supply Chain & EVS</i>	<i>Alameda (County) Health System, CA [2020]</i>
<i>Director, Perioperative Services</i>	<i>Alameda (County) Health System, CA [2020]</i>
<i>Director, Emergency Services & Trauma</i>	<i>Alameda (County) Health System, CA [2020]</i>
<i>SFPD Chief Information Officer (Project)</i>	<i>City & County of San Francisco, CA [2020]</i>
<i>Director, Health & Human Services</i>	<i>County of Marin, CA [2019]</i>
<i>Director, Diversity, Equity & Inclusion (Project)</i>	<i>City & County of San Francisco, CA [2019]</i>
<i>Director, Emergency Department [ZSFG]</i>	<i>City & County of San Francisco, CA [2018]</i>
<i>Chief Financial Officer [ZSFG]</i>	<i>City & County of San Francisco, CA [2017]</i>
<i>Director, Patient Financial Services</i>	<i>City & County of San Francisco, CA [2016]</i>

REFERENCES

Randy Morris, Director
Department of Human Services
County of Santa Cruz

1020 Emeline Avenue
 Santa Cruz, CA 945060
 PH: 415-554-2900 E: Randy.Morris@santacruzcounty.us

Greg Wagner, Controller
City and County of San Francisco

1 Dr Carlton B. Goodlett Place
 Room 316
 San Francisco, CA 94102
 PH: 415-554-7500 E: greg.wagner@sfgov.org

Kim Saruwatari, Director
Riverside University Health System – Public Health
County of Riverside

4065 County Circle Dr, Ste 412
 Riverside, CA 92503
 PH: (951) 358-7036 E: ksaruwatari@rivco.org

COST PROPOSAL

Berkeley Search Consultants is proposing to conduct Executive Search services for the SFHSS. BSC recognizes that our partners in the public sector are attempting to adjust to escalating fiscal constraints imposed by Federal, State and Local governments. As a partner, BSC is proposing to adjust our Professional Recruitment fee structure from our usual and customary 30% to 27.5% of the first year's total cash compensation of the successfully placed candidate. In the Public sector this fee is calculated on the Base Salary only. This proposed adjustment will remain in place for the City and County of San Francisco for FY 2024-2025. At the time of engagement, we can mutually agree on a fixed fee for the purpose of having a defined "not to exceed" fee for budgeting and creating a Purchase Order. BSC's professional recruitment fee is "all inclusive". There will be no add-ons or hidden fees for other line items such as Recruitment Brochure development, Candidate References, Consultant Travel, on-site meetings, nor Stakeholder Input meetings if requested by the client. Any pre-approved expenses incurred in the search, such as advertising cost, shall not exceed \$5,000.00 and shall be reimbursed at cost. The Professional Recruitment fee is billed in 4 phases. The first 1/4 of the estimated fee [Invoice 1 of 4] is due upon completion of the recruitment brochure. A second 1/4 of the estimated fee [Invoice 2 of 4] is due following the recruitment closing date. A third 1/4 of the estimated fee [Invoice 3 of 4] is due following the submittal of a slate of the most qualified candidates. The final invoice [Invoice 4 of 4] is due upon acceptance of an offer by the successful candidate, reconciled based on the accepted total first year's cash compensation. BSC will process approved candidate travel and lodging expenses and submit to SFHSS an invoice for reimbursement of these expenses with the final invoice. Within twelve (12) months of the conclusion of the search if the client elects to hire any candidate/s that have been presented by BSC for any position there will be an additional fee for said hire.

Candidate Travel Reimbursement

Approved candidate travel expenses will be reimbursed per organizations policy. Candidates will be required to submit original receipts for reimbursement of reasonable travel expenses. Claims for reimbursement shall be forwarded to the City no later than 30 days following the last day of travel in order to qualify for reimbursement.

Guarantee

Berkeley Search Consultants warrants that if in the unlikely event that the candidate hired should leave within twelve (12) months of his/her employment, BSC will reinitiate a search for the same position and level as the original placement and credit to this effort all the professional service fees paid on the original assignment, provided that for The City and County of San Francisco paid all invoices in full and on time. The City and County of San Francisco will provide in writing a notice of termination and reasons within five business days after the termination. The conditions under which this guarantee will not apply are for significant modification of the position or responsibilities, business direction or reorganization.

APPENDIX A – TEAM RESUMES

Efton Hall, Jr.

P: 510-898-9308 E: EHALL@BERKELEYSEARCH.COM

Summary

Proven executive with 20+ years of executive recruiting experience and 20 years Senior Healthcare Executive experience. Experience includes groundbreaking work done when I recruited and organized a group of physicians into a limited Partnership to acquire and develop a hospital in Oakland, CA. Later recruited to lead a campaign of establishing a Bond Issue and managing the design and build of a new hospital. Ultimately appointed CEO where I directed an industry leading diversification and expansion strategy. Also have experience in several business start-ups and have led successful turnaround efforts.

Specialties

- Executive Search for Regional, CXO, EVP, SVP, VP and Director positions
- Talent Acquisition and Development
- Strategic Planning
- Turnaround/ Growth Strategies
- Board Relationships
- Integrated Delivery Systems
- Cultural Diversity
- Organization Effectiveness, Transformation and Change
- Leadership Development

Experience

Senior Vice President & Practice Leader, Healthcare, Life Science & Public Sector, Berkeley Search Consultants
January 2020 – Present

Vice President & Practice Leader, Healthcare, Life Sciences & Public Sector, Berkeley Search (formerly Management Recruiters of Berkeley)

April 2008 – December 2019

With 20+ years in executive search and a successful track record in healthcare administration including COO and CEO positions at acute care hospitals and Integrated Delivery Systems, Leads the Healthcare, Life Sciences & Public Sector Practice. Partnering closely with our clients, Directs the practice resources to ensure timely identification and qualification of candidates and success in fulfillment of the assignment.

Board Member at California Association of Healthcare Leaders

January 2011 - 2015

The California Association of Healthcare Leaders (CAHL) is an independent chapter for the Northern and Central California Region, chartered by the American College of Healthcare Executives (ACHE).

Chief Operating Officer at Hayward Medical Center at Kaiser Permanente

2005 - 2007

Kaiser Hayward Medical Center is one of two Kaiser Hospitals serving the Greater Southern Alameda County Area. The Hayward Medical Center has 210 beds, a Level Three Nursery, and Basic Emergency Department. As COO facilitated, directed, and coordinated operational activities and programs relative to the day-to-day operations of the medical center through the delivery of cost effective and quality services.

Interim CEO at Alameda County Medical Center

2003 - 2004

Reorganized and streamlined the Executive Team creating \$1M in personnel cost savings while increasing productivity and accountability. Led the creation of a turnaround strategy designed to eliminate over 60% of the projected loss while maintaining the quality of care.

Hospital Administrator In-Patient and Acute Care Services at Alameda County Medical Center

2002 - 2003

Recruited as Inpatient and Acute Care Services Administrator (functional title COO) of this \$350M multi-site healthcare provider with 3 inpatient campuses and 4 ambulatory care campuses. Was responsible for transforming management structure and steward changes toward a culture of fiscal accountability, high performance, and improved quality. Appointed Interim CEO by the Board of Trustees following the departure of prior CEO.

Business Unit Manager, Healthcare Division at Management Recruiters of Berkeley

1993 - 2002

- Developed and managed the healthcare division of this national recruiting firm.
- Created the healthcare division and positioned it as the #1 ranked division in its specialty in the Pacific Region. Led search campaigns for over 100 retained searches in several prominent health care companies in the U.S. Consistent Pacesetter and achieved Top 10 performer status nationally.

Executive Director at Bay Area Consortium for Quality Health Care

1989 - 1992

Responsible for coordinating this multifaceted non-profit community-based organization that supports the resolution of a variety of health-related community and global concerns. Developed organizations management, planning, compliance, volunteer, fund development and personnel capabilities.

Principal at The Management Results Company

1987 - 1989

Served as president and General Manager of this sole proprietorship that promoted the sales and marketing of devices to improve health and environmental conditions.

CEO at Los Medanos Community Hospital District

1975 - 1987

CEO at Doctors Hospital of Oakland

1974 - 1975

Skills & Expertise

- Strategic Planning
- Organizational Effectiveness
- Leadership Development
- Marketing Strategy
- Cultural Diversity
- Talent Acquisition

Education

Stanford University BA, Sociology, Organizational Theory

University of California, Berkeley MPH, Hospital Administration

Honors and Awards

Board Member at California Association of Healthcare Leaders

Mark HowardP: 510-898-9305 E: mhoward@berkeleysearch.com**Summary**

Executive Search Consultant that specializes in recruiting top professionals in Financial Services, Accounting and Finance, Consumer Packaged Goods, Healthcare and Public Sector. Within Financial Services, our team places executives in Corporate Banking, Commercial Banking, Business Banking, Credit Administration, Wealth Management, Investments and Bank Operations. Our firm has partnered with Clients and Candidates since 1989. Many of our Clients have worked with us for greater than a decade to fill key positions. Our Consumer-Packaged Goods Division places executives in Operations, Sales and Marketing, Accounting and at the C-Level. Our Healthcare Life Sciences & Public Sector Division specializes in senior leadership within the healthcare and life science industries, as well public and government institutions.

Specialties

Executive Search, Professional Recruiting, Strategic Staffing Planning, Succession Planning, Banking, Financial Services, Banking, Investments, Consumer Packaged Goods, Compensation Structure and Negotiation, Retained, Engaged & Contingency Search.

Experience***President and CEO, Berkeley Search Consultants (formerly Management Recruiters of Berkeley)***

January 2005 - Present

Lead the Executive Search teams in Financial Services, Healthcare and Consumer Packaged Goods. Full retained, engaged, and contingency search. Responsible for strategic direction and tactical execution of company.

Account Manager, Financial Services, Management Recruiters of Berkeley

December 1998 - January 2005

Executive Recruiter responsible for developing recruiting relationships with senior executives within the Banking Industry. Full cycle recruiter - Assess Client needs, develop recruiting plan, thoroughly screen potential candidates, negotiate offer and acceptance, transition follow up.

Skills & Expertise

- Executive Search, Recruiting and talent Acquisition
- Employer Branding
- Market Analysis
- Financial Services

Education

University of Colorado at Boulder, BA, Environmental Studies, 1997

Honors and Awards

Achieved CSM Designation (2008): Management Recruiters Inc. established the Certified Senior Manager (CSM) Certification Program in 2005 to highlight its standout Billing Managers' achievements. Professional Billing Managers who hold the CSM are recognized leaders at MRI Worldwide and are ranked consistently at the top of their profession. A CSM is committed to delivering excellence and is accustomed to delivering only the highest quality of customer service.

Julia MorseP: 510-898-9306 E: jmorse@berkeleysearch.com**Education****University of California, Davis**

Bachelor of Arts Degree, English - 2017

Experience***BERKELEY SEARCH CONSULTANTS – Berkeley, CA***

Vice-President- Practice Lead, Healthcare and Public Sector Practices

July 2024 - Present

Senior Director of Recruitment, Healthcare and Public Sector Practices

January 2022 - Present

- Oversee 2-4 Recruiters' sourcing, outreach, and data management efforts for recruitment projects.
- Assist with/conduct sourcing and outreach to potential candidates.
- Conduct screening and vetting of candidates, including minimum and desired qualifications, as well as factors regarding the feasibility of candidates' interest—commute or relocation logic, minimum compensation requirements, family needs, career goals, other interview activity, or any other possible concerns.
- Research candidates and clients to uncover any negative information and handle it appropriately with candidates and clients. Stay abreast of industry intel through research and market contacts.
- Collaborate in communications with hiring authorities and internal HR representatives, including intake meetings to discuss position requirements and search process, preparation and delivery of candidate presentations, search update meetings, interview debriefs, and offer discussions.
- Facilitate interview processes, including advising on interview best practices, scheduling candidates, and collection and distribution of vital information.
- Full job post management, including creation, posting, and application screening, and communication—directly or through oversight of a recruiter.
- Search document creation—job posts, recruitment brochures, internal process tracking documents, candidate summaries, search metrics, candidate questionnaires, applicant trackers, and outreach messaging.
- Conduct thorough references, education verifications, and license verifications. Serve as resource to candidate and client as the winning candidate goes through the pre-employment phase.

Recruiter

June 2017 – January 2022

- Identify, recruit and vet top level candidates for placement in Healthcare, Life Sciences and Public Sector roles.
- Research candidates using social media and internet tools.
- Research search opportunities for practice engagement.

Philanthropy Intern for V.I.P. Studios – Davis, CA

April - June 2017

- Facilitated studio's philanthropic giving by locating, evaluating, and reaching out to silent auction organizers to offer donations. Saw events through to the end and kept record of them in excel and google spreadsheets and google calendar.
- Advised on social media marketing.

Account Executive for Gawain Consulting – Davis, CA

March - May 2017

- Client acquisition: compiled database of contact information for potential clients, contacted and acquired clients via email.
- Content creation: researched and wrote blog posts for clients' blogs.

Event Specialist for Advantage Solutions – Davis, CA

March - May 2017

- Set up display and prepared products for in-store demonstrations.
- Crafted and delivered engaging sales pitches to customers, answered their questions and concerns.
- Delivered reports of event's success to store manager and supervisor.

Field Manager at Grassroots Campaigns – Berkeley, CA

June 2016 - September 2016, December 2016 - January 2017

- Raised funds and visibility for various social justice organizations as a street canvasser.
- Managed a crew of 1-4 other canvassers, ensuring our success on the field and keeping records of collected donations.
- Ran training for new canvassers and assisted in general office tasks.

Skills

- Languages: English - fluent, French – proficient, Spanish – conversational
- Excellent communication skills, written and oral
- Great attention to detail
- Punctual and dependable
- Troubleshooting and problem solving
- Proficient in Microsoft Office and Google Drive
- Works well in group or independently

Laura AyersP: 510-343-5330 E: layers@berkeleysearch.com**Experience*****Berkeley Search Consultants****Senior Recruiter, Healthcare and Public Sector Practices*

August 2023 - Present

Recruiter, Healthcare and Public Sector Practices

May 2022 – August 2023

- Identify prospects, conduct outreach, and perform necessary assessments in order to place top qualified candidates into healthcare and public sector positions nationwide.
- Establish and utilize internal database, networking, cold-calling, and research techniques to identify and engage passive candidates in the market.
- Develop robust pipelines to build and maintain a strong network of potential candidates.
- Continually provide support and input in several of the practice's key areas of activity including market research, business development, client communication, and other administrative operations.

Center for Social Dynamics — San Jose, CA*Behavior Specialist*

Sep 2021 - Apr 2022

- Provided personalized mental health and behavioral treatment to children and adolescents with autism and other developmental delays through evidence based behavioral approaches including Applied Behavioral Analysis (ABA).
- Collaborated directly with clinical team to assess clients' needs to perform multidisciplinary and individualized treatment.
- Cultivated trust and positive instructional control with clients in order to strengthen the quality of services and encourage progression towards meeting treatment targets.

International Rescue Committee (IRC) — Sacramento, CA*Youth Program Intern*

June 2021 - Sep 2021

Volunteer Coordination and Donations Intern

Aug 2020 - June 2021

- Assisted senior specialists to plan and conduct student outreach, intake, assessments, and related recordkeeping to provide resources for secondary and post-secondary training and educational services.

- Lead student instruction and exercises on a range of workforce development topics including medical terminology courses, resume writing sessions, and college application and financial aid assistance.
- Acted as the liaison between all staff and volunteers for the largest, nonprofit refugee resettlement organization in the U.S.
- Conducted over 80 interviews for potential interns, determined best position fit for candidates, and lead new hire orientations up to four times a month.

UC Davis Department of Public Health Sciences — Davis, CA

Public Health Ambassador

Sep 2020 - June 2021

- Advanced the efforts of communicable disease prevention and control through community engagement on university campus.
- Supported the overall goals of preventing the spread of COVID-19, ensuring a healthy community in Davis, and working towards the eventual reopening of campus
- Educated campus visitors, students, and staff about public health and enforced university policies such as weekly testing.

Yolo County Department of Health and Human Services — Davis, CA

Tobacco Prevention Program Intern

Sep 2019 - Mar 2020

- Interned as a part of a student coalition with a primary goal of promoting tobacco free multi-unit housing in Yolo county and raising awareness about the dangers of secondhand smoke.
- Conducted over 100 public opinion polls to collect statistical data for a basis of public policy reform.

Education

University of California, Davis, Davis, CA — Bachelor of Science Graduated: June 2021

Major in Managerial Economics; Minor in Public Health Sciences

- **GPA: 3.93 Graduated Summa Cum Laude**

Skills

- Proficient in Microsoft Office Suite and Salesforce.
- Knowledge of medical terminology and experience in direct patient care.
- Excellent time management skills and ability to efficiently multitask while paying close attention to detail.
- Cultural competency training and ability to work with diverse and underserved populations.
- Analytical and critical thinking skills.
- Strong written and verbal communication skills.

Roger Bazan-Flores

P: 510-900-4281 E: roger@berkeleysearch.com

Experience

Berkeley Search Consultants

Recruiter, Healthcare and Public Sector Practices

October 2023 – Present

- Identify prospects, conduct outreach, and perform necessary assessment in order to place top qualified candidates into healthcare and public sector positions nationwide.
- Establish and utilize internal database, networking, cold-calling, and research techniques to identify and engage passive candidates in the market.
- Develop robust pipelines to build and maintain a strong network of potential candidates.
- Continually provide support and input in several of the practice's key areas of activity including; market research, business development, client communication, and other administrative operations.

Graduate Student Associate | RISE Berkeley Public Health Careers & Leadership Office — Berkeley, CA

July 2022 – May 2023

- Operate as an adviser, liaison, advocate, and internal consultant to the leadership of Berkeley Public Health student groups & be of support/mentorship of the graduate student organizations linked with the RISE Office. GSI & logistical support for leadership/strategies course through the graduate Berkeley School of Public Health.

Health Policy Consultant | Kaiser Permanente Institute for Health Policy — Oakland, CA

June 2022 – August 2022

- I supported policy advocacy, lobbying efforts with the GR team and lead responsibility in policy issue briefs, position papers, infographics, and other written products for internal and/or external use.

Health Career Connection (HCC) | Research Consultant — Oakland, CA

October 2021 – March 2022

- Performed data exploration and prepared executive impact reports for key stakeholders. Coordination of qualitative research methods with clients and alumni, transcribing, synthesizing, and completing research projects with upper management team.

LA County DMH | COVID-19 Comm. Ed. Ambassador — Los Angeles, CA

October 2020 – December 2020

- Hybrid work presenting to marginalized communities in English/Spanish on minimizing exposure to COVID-19 & mental health/wellbeing while practicing social isolation. PPE distribution events to the most in need

communities in LA.

Wellness Navigator | LAC+USC Wellness Center — Los Angeles, CA

June 2019 – September 2019

- Facilitated patients take control of their own health and wellbeing through culturally sensitive prevention services to address root causes disease while improving health outcomes.

Research Experience

McNair Post-Baccalaureate Research Program | UCLA AAP GMRP — Los Angeles, CA

- 2-year independent research-intensive program my project with UCLA Fielding School of Public Health on peripheral generational trauma and its effects on communities of color & health

Volunteer Experience

COPE Health Scholars | Adventist Health White Memorial — Los Angeles, CA

- Clinical duties vital sign monitoring, ambulation, hygiene and feeding patients while shifting in ICU, Orthopedic, Medical Surgical, and Emergency Depts.

Education

University of California, Berkeley, Berkeley, CA - *Master of Public Health (Health Policy & Management)*

Relevant Coursework: Policy Analysis, Health Care Organization/Management, Health Care Quality, Econometrics, Strategic Health Management, Health Information Tech, Health Economics, Epidemiology

University of California, Los Angeles, Los Angeles, CA - *Bachelor of Science in Environmental Science (Class of 2021)*

Relevant Coursework: Intensive Biology, Classical Physics, General Chemistry, General Biological Laboratory Series, Introduction to Geographic Information Systems (ArcGIS/QGIS), Environmental Data Sets (Rstudio)