PIEDMONT TRIAD REGIONAL COUNCIL
1398 CARROLLTON CROSSING DRIVE
KERNERSVILLE, NC 27284
(336) 904-0300
MATTHEW L. DOLGE • EXECUTIVE DIRECTOR

January 12, 2025

Ms. Susan Russo Klein
North Carolina State Bar Board Certified Specialist in Employment Law
Roberts & Stevens, P.A.
City Centre Building
301 College Street, Suite 400,
Asheville, NC 28801

Dear Ms. Klein:

Thank you for calling on the Piedmont Triad Regional Council (PTRC) to assist you with management services. It is my understanding that you are interested in assistance with the recruitment and selection of a Project Manager. Please find enclosed a proposal that details the scope of work we anticipate. We are proposing to do the work for a fee of $7,000.00. When you are ready for us to begin please return a signed proposal that acknowledges your acceptance and agreement of the scope of work and terms. If you have any questions about the scope of work, terms or desire a different format please contact me.

The PTRC's mission is to serve local governments and their affiliates by being accessible and providing high quality services. We provide these services from a unique position and familiarity with NC public administration. You can expect the highest degree of expertise and precision from our staff.

I very much appreciate you giving us an opportunity to submit this proposal. I am available to discuss this project with you at your convenience.

Sincerely,



Matt Reece
Assistant Director

Enclosures

PROFESSIONAL SERVICES OFFERED TO
THE TOWN OF BLACK MOUNTAIN
FOR FACILITATION OF AN EXECUTIVE SEARCH FOR A FINANCE DIRECTOR

I. Work Elements.

As part of the facilitation of the executive search process the PTRC agrees to conduct the following work elements:

A. Meet with the Town's management to discuss the desired candidate profile and search process. This phase can be accomplished through virtual meetings.

B. Collect information to share with candidates about the position.

C. Use PTRC's online application portal to receive applications and to link to professional social media networks such as Indeed. This allows for boosting of recruitment reach and a method to record and process applications.

D. Screen and filter candidates per the direction of the search committee and/or the Town's representatives applying the selection criteria.

E. Develop and gain consensus of the methods for the review and assessment of applicants, this process may include criteria based review of applicant pool, "in-box exercises" or task oriented screening, response to written questions, response to mock scenarios, presentations by candidates, structured interviews, and other methods useful to determine candidate selection.

F. Meet with the Town's management to review and discuss the following issues: expectations of the results, areas of assessment, confirmation of job relevancy, and overall gain a mutual understanding of the candidate assessment process.

G. Facilitate the formal interview and candidate assessment process.

H. Assist the Town's management regarding the hire decision.

I. Provide miscellaneous technical assistance with background search, offer, and the transition of the final successful candidate.

II. Staff Qualifications

The staff members that will be working on the project are experienced in local government personnel work. Matt Reece will be the project manager. Matt serves as PTRC's Assistant Director. Matt directs the management services, general administration, IT and HR functions for the Regional Council. He has extensive experience providing technical assistance to local governments throughout the state. He regularly conducts a variety of management studies including group facilitation, executive searches, policy analysis, and personnel classification and compensation analysis. As a past-president of regional and statewide professional organizations, Matt has directed and organized research and discussion on a variety compensation and HR management topics. Matt has also served as adjunct faculty in the Master of Human Resources Management program for Webster University at their Fort Bragg facility. He is a member of ICMA, recognized with 30 years of public service, and upholds the code of ethics. Matt has a Bachelor of Arts in Political Science and a Master of Public Affairs, both from the University of North Carolina at Greensboro.

Management consultants Ray Smith, Terri Rivers, Ronda Tatum and Kim Newsom are also available for consultation. All are retired North Carolina local government professionals. To be concise in the presentation of this proposal their qualifications are available upon request.

III. Fee for Services

A fee, not to exceed, $7,000 will be billed to the Town of Black Mountain at the conclusion of the process.

IV. References

The PTRC has been involved in technical assistance and management consultation for four decades. The following is a list of local governments for executive searches have been prepared recently:

City of Asheboro
City of Randleman
City of Thomasville
Town of Biscoe
Town of Bermuda Run
Town of Denton
Town of Jamestown
Town of Lewisville
Town of Mocksville
Town of Mount Pleasant
Town of Spencer
Village of Clemmons

V. Acceptance and Confirmation of Proposal

If you agree with the terms of this proposal please indicate by signing below and returning a signed original to the offices of the PTRC. PTRC staff will begin work as soon as we are notified of your acceptance. This confirms the Town's intention to accept the scope of work as indicated in the proposal presented by the PTRC, aid and otherwise meet the responsibilities outlined, and confirms the authorization and encumbrance of funds sufficient to pay the fee for service.

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Accepted for the Town of Black Mountain Title

_____

Date

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

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(Signature of finance officer).

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Date