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**DATE: April 18, 2024**

**SUBJECT: AMENDMENT #1  
AS-NEEDED EXECUTIVE RECRUITMENT SERVICES  
REQUEST FOR QUALIFICATIONS**

**FROM: Felicia Ansley, Contract Administrator**

The Harbor Department's Request for Qualifications for As-Needed Executive Recruitment Services is amended through this notification as described below.

It is the responsibility of all proposers to review both the Harbor Department's website and the Regional Alliance Marketplace for Procurement (RAMP) for any RFP revisions or answers to questions prior to submitting a proposal in order to ensure their proposal is complete and responsive.

- 1) The language for "SOQ Content", Sections 3.4.1 through Section 3.4.6, is **REPLACED by the language shown on the attached pages.**

Please note that Section 3.4.7 of the RFQ remains unchanged.

- 2) The deadline to submit Statements of Qualifications has been extended from April 30, 2024 to **Monday, May 6<sup>th</sup>, 2024 at 3:00 p.m.**
- 3) Due to the changes made to Sections 3.4.1 through Section 3.4.6 of the RFQ (see item 1), Exhibit E, the "RFQ Selection Evaluation Form" has been updated to be consistent. A copy of the evaluation form is provided in the RFQ only for the proposer's reference; the updated form is attached to this Amendment.
- 4) Due to the changes made to Sections 3.4.1 through Section 3.4.6 of the RFQ (see item 1), the third bullet in the checklist for "SOQ Submittal Requirements" (Section 3.5) should read:
  - SOQ with the following sections, in order:
    - Firm Qualifications, Experience and References
    - Project Methodology
    - Organization, Personnel and Staffing
    - Project Management and Timeline
    - Cost

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**Revised** language for Section 3.4.1 through Section 3.4.6, “SOQ Content”:

## 3.4 SOQ Content

The following items shall be included in your SOQ:

### **1. Cover Transmittal Letter**

Provide a brief narrative which introduces the firm and team highlighting the special strengths of the firm to perform the work requested in this RFQ. Include a brief description of how long the firm has been in business and whether the firm specializes in public or private sector recruitment. The letter should be signed by an authorized principal of the proposing consulting firm.

### **2. Firm Qualifications, Experience and References**

Interested firms must be able to demonstrate a record of successful executive searches for high level management positions. Experience in conducting searches for the public sector is especially desired. Include information regarding your firm’s experience involving the size and level of complexity of the proposed project. Qualifications and experience for proposed subconsultants should also be included.

In order to evaluate the responses to this requirement, please submit a listing of executive positions recruited for within the last five years. Please list the positions by title, the agency for which the recruitment was conducted, and the major areas of responsibility for that position.

In addition, please provide a reference/point of contact from the agency you recruited for – for any three positions of your choosing – within the last five years, with whom we may discuss the process and their experience in working with your firm.

Identify any members of your proposed team, including proposer’s firm and any subconsultant firms, who are former Commissioners, officers or employees of the Harbor Department. Provide their name, proposed team position, and their past position and years of employment/appointment with the Department. If your proposed team does not have any such members, please include a statement in your proposal so stating.

Proposers are advised that it is a proposer’s obligation to determine whether any conflicts of interest exist for their team members and the extent to which those conflicts need to be resolved or disclosed prior to engaging in business with the Department.

### **3. Project Methodology**

Interested firms must demonstrate expertise in innovative recruitment methods, understanding of equal employment opportunity principles, and understanding of the

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sensitivity of conducting high level executive searches from the standpoint of both the Harbor Department as a public entity and of potential candidates.

In order to evaluate the responses to this requirement, please submit the following:

- 1) A description of the firm's methods of information gathering in order to obtain the views and expectations of Harbor Department management on the duties and responsibilities of the position; minimum qualifications including training, experience, talents, skills, and personal attributes; and desirable qualifications to identify exceptional candidates. Submit three samples or recruitment material/brochures.
- 2) A description of the firm's methods of identifying candidates whose background and experience matches the position description. Include a description of the firm's methods of balancing the transparency required in the public sector interview process with the interest in preserving the confidentiality of the candidates.
- 3) A description of the firm's opinion of how many applicants make up an adequate selection pool.
- 4) A description of the firm's method for achieving a diverse (race, gender, sexual orientation, professional experience, etc.) pool of qualified candidates.
- 5) A description of the firm's methods to screen the pool of applicants so that a manageable pool of interviewees is obtained.
- 6) A description of the firm's methods used to evaluate management skills, interpersonal traits, and important characteristics. Submit three samples of the firm's candidate reference summaries. Items that should be included in these summaries include the relationship of the candidate to the firm, candidate strengths, management style, accomplishments, academic history, plus any other items that may be valuable in accessing the skills, knowledge, and abilities of a potential candidate.
- 7) A description of the firm's method used to check job references, academic backgrounds, and professional credentials.
- 8) A description of the firm's ability to administer the selection process including:
  - a) Preparing all application and evaluation materials to be utilized in the selection process;
  - b) Acknowledging in writing all applications and resumes received;
  - c) Reviewing and evaluating all applications and resumes;
  - d) Conducting preliminary interviews of highly qualified candidates to determine their interest, qualifications, pertinent accomplishments, relevant experience, and ability to perform the duties and responsibilities of the position;
  - e) Arranging interviews and, if necessary, coordinating travel or accommodation details for each candidate;
  - f) Organizing and coordinating candidate review panels or other selection processes;

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- g) Preparing questions, exercises, and evaluation forms to be utilized by the interview panel(s);
- h) Providing detailed documentation supporting the selection and non-selection of all candidates interviewed;
- i) Notifying unsuccessful candidates; and
- j) Providing the contract administrator with status reports on executive searches.

#### **4. Organization, Personnel and Staffing**

Specify the project manager and staff (including partners and subconsultants) who will be conducting the search activities, their credentials and experience, and the role that they will fill during the proposed executive search process.

- Include names, titles, licenses, certificates, fields of expertise, and relevant experience for all proposed personnel and staff.
- A resume for each professional and technical person assigned to the project should be provided as part of an appendix to the SOQ. The resumes for each professional and technical person assigned to the project should include at least three (3) references from previous assignments with telephone and e-mail contact information.
- Provide a project organization chart which depicts the organization of the project team, including reporting relationships to the Department's Project Manager and supervision of project team staff.

#### **5. Project Management and Timeline**

Describe how your firm intends to manage all aspects of the work to be performed, including schedules for completion of tasks, procedures for scheduling and cost control. Include a timeline that illustrates the recruitment process.

#### **6. Cost**

Provide pricing and cost information for the project. Include hourly rates for all proposed team members. Include a total proposed fee to conduct a search. The fee must be reasonable and competitive with other SOQs for executive search services without compromising the quality of the search and the resulting candidate pool. The proposed fee should include costs for advertisements and brochures generated for the executive search. Additional expenses, which are not included in an overall fee, but are expected to be reimbursed by the Harbor Department including pricing for any proposed equipment, software, or hardware costs and any other related expenses for the project, must also be detailed in the SOQ.

Indicate if your firm offers any type of guarantee, if a shortlisted finalist is selected for employment and then terminated for cause or resigns within 24 months.

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Provide an explanation of how total costs for the services rendered for executive searches are determined.

Discuss any budget control measures of your firm and proposed subconsultants.

## EXHIBIT E

### RFQ SELECTION EVALUATION FORM

**PROJECT:** AS-NEEDED EXECUTIVE RECRUITMENT CONSULTANTS

#### SCORING GUIDELINES:

Rater's Score: (Range 0-5) - 0=Not included/Non responsive; 1= Serious Deficiencies; 2=Marginal Abilities; 3=Adequate, 4=Well Qualified; 5=Exceptionally Qualified.

Scores must be in **whole numbers** only (for example, "3.5" is unacceptable).

Weighing Factor: A range of 1 through 6, with 1 being of relative lower importance and 6 being relative highest importance. Each number (1 through 6) may be used more than once; however, in establishing weights, the total of all the weighing factors (A –E) must equal 20. Example: 3+2+6+4+5=20 or 3+3+3+6+5=20

Weighted Score= Rater's Score multiplied by (x) Weighing Factor. Totals should be calculated for each criterion.

Total score = Sum of all weighted scores.

Firm Name	Evaluated by	Date

CRITERIA TO BE RATED		RATER'S SCORE	WEIGHING FACTOR	WEIGHTED SCORE
A. Firm Qualifications, Experience and References	How long has the company been in business? Has the company done similar work? Level of expertise in subject matter areas?		5	
B. Project Methodology	Quality of proposed methodology for executive recruitment?		3	
C. Organization, Personnel and Staffing	Qualification and experience of proposed personnel for requested services? On-site availability of team and project manager?		5	
D. Project Management and Timeline	Quality of project management and timeline?		3	
E. Cost	Competitive rates and fees proposed? Are proposed budget management, fees and staff hours proposed and clearly defined?		4	
	<b>Maximum points possible=100</b>		<b>A+B+C+D+E=20</b>	<b>Total Points=</b>