



West Virginia Purchasing Division

2019 Washington Street, East
Charleston, WV 25305
Telephone: 304-558-2306
General Fax: 304-558-6026
Bid Fax: 304-558-3970

The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at wvOASIS.gov. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at WVPurchasing.gov with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Header @ 3

List View

- General Information**
- Contact
- Default Values
- Discount
- Document Information
- Clarification Request

Procurement Folder: 1216050

Procurement Type: Central Purchase Order

Vendor ID: VS0000042889

Legal Name: Spirit Consulting LLC

Alias/DBA: Spirit Consulting

Total Bid: \$20.00

Response Date: 05/01/2023

Response Time: 16.02

Responded By User ID: spiritconsulting

First Name: Jenna

Last Name: Haley

Email: jhaley@spiritmco.com

Phone: 6303540989

SO Doc Code: CRFQ

SO Dept: 1500

SO Doc ID: AGO2300000002

Published Date: 4/28/23

Close Date: 5/2/23

Close Time: 13:30

Status: Closed

Solicitation Description: Addendum No 1-Executive Search Firm for Executive Director

Total of Header Attachments: 3

Total of All Attachments: 3



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

**State of West Virginia
 Solicitation Response**

Proc Folder: 1216050
Solicitation Description: Addendum No 1-Executive Search Firm for Executive Director
Proc Type: Central Purchase Order

Solicitation Closes	Solicitation Response	Version
2023-05-02 13:30	SR 1500 ESR04262300000005384	1

VENDOR
 VS0000042889
 Spirit Consulting LLC

Solicitation Number: CRFQ 1500 AGO2300000002
Total Bid: 20 **Response Date:** 2023-05-01 **Response Time:** 16:02:51
Comments: We are pleased to offer the WV First Foundation a 20% discount, on both services, our Search Executive Fee and our Optional Work Psychology Fee. All Invoices are Net 10.

FOR INFORMATION CONTACT THE BUYER
 Toby L Welch
 (304) 558-8802
 toby.l.welch@wv.gov

Vendor Signature X	FEIN#	DATE
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All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Executive Director - WV First Foundation	1.00000	EA	20.000000	20.00

Comm Code	Manufacturer	Specification	Model #
80111700			

Commodity Line Comments: Spirit Consulting s current pricing rates are 25% for executive search services and 7.5% for optional work psychology services. We are pleased to offer the WV First Foundation a 20% discount, on both services, as one of our CEO s family friends is entangled in an opioid addiction, which has ruined his life and greatly affected his family. We would love to get behind this cause to find a leader who will administer justice on behalf of the victims and families that have suffered through this epidemic. Therefore the total investment for execution of this search is equal to 20% of the hired candidate s first year total compensation for executive search services, plus 6% of the hired candidate s first year total compensation for optional work psychology services. Total compensation is defined as annual base salary, annual bonus projected at the maximum amount, and sign-on bonus. It excludes benefits or relocation. As a standard practice, we provide all clients with percentage based pricing terms. Due to the nature of this proposal, we are unable to set a fixed rate as pricing and job responsibilities are unclear. In addition to the pricing terms above, an additional \$5,000 is also requested to cover the expenses listed below. All invoices are due Net 10. More details included in our proposal.

Extended Description:

Executive Director position for the non-profit organization - WV First Foundation

*Vendors must enter a lump sum, grand total amount as better described in Section 4 of the specifications.



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
 Centralized Request for Quote
 Service - Prof

Proc Folder: 1216050		Reason for Modification:	
Doc Description: Addendum No 1-Executive Search Firm for Executive Director		Addendum No 1 issued to publish questions and answers	
Proc Type: Central Purchase Order			
Date Issued	Solicitation Closes	Solicitation No	Version
2023-04-28	2023-05-02 13:30	CRFQ 1500 AGO2300000002	2


BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Customer Code: VS0000042889
Vendor Name : Spirit Consulting
Address : Spirit Consulting #3668
Street : 111 North Wabash Ave. Suite100
City : Chicago
State : IL **Country :** United States **Zip :** 60602
Principal Contact : Christopher Gomez
Vendor Contact Phone: 630-686-1414 **Extension:** n/a

FOR INFORMATION CONTACT THE BUYER
 Toby L Welch
 (304) 558-8802
 toby.l.welch@wv.gov

Vendor Signature X  **FEIN#** 83-2553593 **DATE** 5/01/2023

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

Addendum No 1 is issued for the following reasons:

1) To publish vendor questions and responses

--no other changes--

INVOICE TO**SHIP TO**

ATTORNEY GENERAL'S
OFFICE
1900 KANAWHA BLVD E
BUILDING 1 RM E-26
CHARLESTON WV
US

ATTORNEY GENERALS
OFFICE
1900 KANAWHA BLVD E
BUILDING 1 RM E-26
CHARLESTON WV
US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Executive Director - WV First Foundation	1.00000	EA	Total Salary	20%

Comm Code**Manufacturer****Specification****Model #**

80111700

Extended Description:

Executive Director position for the non-profit organization - WV First Foundation

*Vendors must enter a lump sum, grand total amount as better described in Section 4 of the specifications.

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	QUESTIONS ARE DUE BY 4:00 P.M.	2023-04-25

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ AGO23-002

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Spirit Consulting

Company



Authorized Signature

5/01/2023

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.
Revised 6/8/2012



**Response to RFP #CRFQ 1500 AGO230000002
Executive Search Firm for Executive Director Position**



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Introduction Letter

Dear State of West Virginia Search Committee,

We understand how difficult finding the best Executive Director can be. While searching for the right fit, it's natural to feel frustrated with a lack of potential candidates or overwhelmed by the threat of hiring the wrong person. You should be able to rid this concern from your mind so you can focus your time and energy on *strategic planning the distribution of the opioid trial settlement funds*.

Finding the right fit to lead your new non-profit is a serious task that can impact all aspects of your community. That's why our team is dedicated to hiring the perfect fit. We will find, hire, and onboard your new Executive Director so that you will no longer have to waste hours stressing over this vacancy in your organization. We will help you with every necessary step of hiring your *all-star* executive and ensure they are the right person for the job through work psychology fit assessments and executive coaching. Let's look in more detail about what we can do for you:

1. **Finding the Perfect Fit:** After meeting with you and understanding your expectations, values, and objectives, we will craft our strategy and begin our search. We utilize an aggressive, active recruiting approach—rather than “posting and praying” on job boards, we take the information gathered to formulate specific searches that allow us to acquire high-performing talent.
2. **Hiring the Right Person:** Before a candidate's resume reaches your desk, they would have already been screened by our team of executive search professionals. This way, you are not wasting time with unqualified candidates! Upon your conduction of internal interviews and designation of finalists, we will conduct Hogan Assessments to provide you with additional insight to ensure you hire the right candidate. At your request, we will also assist with all final interviews, salary negotiations, and contractual agreements so that you know you have someone to assist you in every step of the process.
3. **Seamless Onboarding:** Our service does not stop once your executive is hired! We are so confident in our process that we offer a 24 month guarantee—if you terminate the hired candidate within 24 months for under performance, we will find their replacement at no-cost. This, coupled with four executive coaching sessions during the hire's first six months of placement, ensures that your hire on-boards seamlessly into the organization and gives you peace of mind that you will not be in this position again in the near future.

As the lead of our prospective engagement, I possess over seventeen years of executive search experience across different industries, including extensive success in the non-profit industry. This includes filling multiple CEO, Executive Director, & Leadership searches for non-profit and health focused agencies like Easter Seals, Ronald McDonald House Charities, Muscular Dystrophy Association, the Early Learning Coalitions of Hillsborough County & Southwest Florida, Ada S. McKinley, Chicago Family Health Center, the Community and Economic Development Association of Cook County, Ascension Health, and Duke University Health System, just to name a few. We stand ready to demonstrate the value we bring to your business. Thank you for your consideration – we hope to serve as your executive search partner!

Sincerely,

Christopher Gomez
Chief Executive Officer



Background

General

Spirit Consulting is an Illinois Limited Liability Corporation and certified [Minority Business Enterprise](#) owned and led by Christopher Gomez. While headquartered in Chicago, IL, Spirit Consulting has consultants based in Florida, Illinois, Michigan, and New York. While Spirit was formally founded in November 2018, Christopher began serving the executive search clientele from which Spirit Consulting was born as of 2007. In that time, we have served the nation's largest and well respected non profit brands like [Ronald McDonald House Charities](#), [Muscular Dystrophy Association](#), [Easter Seals](#), [Ascension](#), and [Duke University Health System](#), just to name a few. Spirit Consulting has adjusted the executive search industry's pricing model, which invoices based on time (invoices at 0 days, 30 days, and 60 days), so our clients pay for results. Further details are provided within our proposal, and you can enjoy the opportunity to pay for completed deliverables throughout our engagement.

Firm and Project Personnel Experience

Firm Experience

One of Chris' industry focuses over his 17 year executive search career has been focused in the non-profit / quasi-governmental agency sector. Some of our clients have already been listed above, and these clients have retained us for executive searches at the Director level+.

In the last four months we completed two CEO searches for the - state funded - quasi governmental / non-profit agencies of the [Early Learning Coalitions in Hillsborough County](#), FL and [Southwest](#), FL. The CEOs that we hired for these organizations manage capital budgets of \$330MM (Hillsborough) and \$110MM (SWFL). Listed in our references, we invite you to watch video testimonials attesting to these successful placements, as well as speak to the teams we worked with. Another non-profit agency we had the pleasure of working with was the Ronald McDonald House Charities. We assisted this non-profit organization by finding three different Executive Directors, and a corporate leader for RMHC is also listed in our references.

Qualifications of Proposed Staff and/or Partners

Bios & Resumes of the proposed project team can be seen below.



Christopher Gomez, MBA - Chief Executive Officer & Executive Search Project Manager:

Christopher Gomez is a consulting professional with over seventeen years of executive search experience supporting governmental, quasi-governmental, and nonprofit organizations in executive search. After spending 12 years working for another executive search firm establishing strategic relationships with the nation's premier organizations, Christopher felt called to establish Spirit Consulting, a management consulting company whose executive team is composed of accomplished business leaders tied together by their zeal to carry out the mission of *inspiring virtuous leadership by hiring all-star executives*. Spirit Consulting offers services in Executive Search, Organizational Development, Work Psychology, and Executive Coaching. Today, Christopher serves as the leader of the Executive Search service line and leads the firm's operations as Chief Executive Officer.

In recognition of his accomplishments as the CEO of a Minority Business Enterprise (MBE), he was honored in 2020 as CEO of the Year by CEO Monthly and a Top 40 under 40 by *Negocios Now*. As a public speaker and podcaster, Christopher has made several appearances on NBC, CBS, WGN, Shalom Media, and is a regular contributor on Relevant Radio and the Chicago Tribune.

In summary, Christopher brings over 17 years of executive search experience to the table as Spirit's Executive Search Lead and would project manage the **Executive Director** engagement. Christopher would anticipate investing particular time in stakeholder analysis, recruiting strategy, candidate selection, and client management.

--- Resume to Follow ---



CHRISTOPHER GOMEZ, MBA

cgomez@spiritmco.com

WORK EXPERIENCE

Spirit Consulting – Oak Brook, Ill.

January 2019 – Present

Chief Executive Officer

Spirit Consulting was founded by Christopher Gomez, host of the Virtuous Heroes Podcast. Chris has over 15 years of experience *helping organizations hire all-star executives* and is a sought after speaker. He is a regular contributor on Relevant Radio and the Chicago Tribune. In recognition of his accomplishments as the CEO of a leading Minority Business Enterprise, he was honored in 2020 as “CEO of the Year” by CEO Monthly and a “Top 40 under 40” by Negocios Now.

Catholic Sports Camps – Oak Brook, Ill.

January 2019 – March 2021

Founder & Board Member

Catholic Sports Camps (CSC) inspire a more active and life-long relationship with Christ through sports excellence, friendship and Catholic faith-building activities for children and their families. As a nonprofit organization, our mission is to impact our Catholic faith by changing the future of one sports camper at a time. In 2018, Catholic Sports Camps gave away over \$25,000 in scholarships to more than 400 campers.

River of Light – Chicago, Ill.

August 2017 – Present

Board Member

River of Light LTD is a non-profit organization dedicated to picking up and delivering donated items to needy individuals and various organizations. The majority of these items consist of various breads and pastry products, together with clothing and household items. Each day, volunteers deliver bread and pastry products — as well as coats, hats, gloves and blankets in the colder weather — to approximately 22 stops around Chicago.

David Gomez & Associates – Chicago, Ill.

Partner

September 2014 – December 2018

Vice President, Talent Acquisition

March 2013 – September 2014

Director of Recruiting – Client Manager

December 2008 – March 2013

Researcher/Recruiter

August 2002 – December 2008

Headquartered in Illinois since 1978, David Gomez & Associates, Inc. (DG&A) is a retained executive search and management consulting firm with clients spanning multiple industries across the United States. DG&A offers expert executive search services and human capital consulting (including diversity expertise and succession planning). Through our unique, proprietary search process, we deliver only the most exceptional executive and managerial candidates: business leaders adept at navigating the complexities inherent to the global economy.

EDUCATION

DePaul University – Chicago, Ill.

Master of Business Administration – Sales Leadership & Entrepreneurship, *cum laude*

2013

Honors: Cum Laude (GPA: 3.7/4.0)

University of Illinois – Urbana-Champaign, Ill.

Bachelor of Science – Business Administration and Marketing

2006

Activity: Illini Hockey

PROFESSIONAL ORGANIZATION

Society of Talent Acquisition and Recruitment

2015-Present | Mentoring Program 2016



Amie Rowe, Ph.D., I/O Psychologist & Executive Coach:

Amie is most passionate about providing coaching and guidance to leaders facing significant growth, challenge or change. She is particularly interested in supporting leaders and leadership teams as they adjust and adapt to significant events such as role transitions, company mergers and acquisitions, employee population shifts, fluctuations in market conditions, and industry challenges. She is adept at helping leaders find their voice and enhance their brand. She recognizes and appreciates cultural differences and finds a great deal of enjoyment coaching and partnering with companies and leaders around the globe. Collaborating as a partner, Amie brings a fresh perspective to increase individual success, enhance team effectiveness, and improve organizational performance. Trained as an Industrial/Organizational psychologist, she provides business insight and professional psychological expertise to her clientele.

In terms of process, Amie believes in starting fast, digging deep and ending strong, so clients gain both immediate impact and long-term sustainability of enhanced leadership abilities and skillsets. She works to build trust and connection quickly and focuses on an individual's most critical, high-value, and personally meaningful topics. By cultivating self-insight, she helps her clients think practically and strategically about their development. She is known as a leading expert in the use of personality assessments and has an affinity for gaining insight about individuals using multiple assessment tools. This enhances her understanding of the whole person, which grounds her approach to coaching. Utilizing an action/reflection cycle, she supports individuals acquiring and applying new behaviors in novel ways or situations. Then, she extracts maximum learning by facilitating reflection on the effectiveness of those actions, continuing to hone behaviors, and encouraging clients to stretch to the edge of their comfort zones.

Over her career, Dr. Rowe has held leadership positions within several large organizations, including serving as a consultant for several management consulting firms and successfully founded and managed her own independent practice. Her work spans multiple industries, with particular focus in healthcare, education, energy and utilities, consumer products, retail, financial services, non-profit organizations and state governments.

--- Resume to Follow ---



AMIE ROWE, PH.D.

arowe@spiritmco.com

WORK EXPERIENCE

Spirit Consulting – Oak Brook, Ill.

October 2022 – Present

Industrial/Organizational Psychologist

Spirit Consulting was built to help our clients achieve peak success through the services of Organizational Development, Executive Search, Industrial/Organizational Psychology, and Executive Coaching. To learn more about how we can help you develop a high performing organization, strengthen your culture, coach executives to higher levels of execution, or hire an all-star executive, visit us on the web at www.spiritmco.com.

Consulting Rowe – Detroit, MI

2014 - Present

Founder & President

Providing coaching and guidance to leaders facing significant growth, challenge or change. Supporting leaders and leadership teams as they adjust and adapt to significant events such as role transitions, company mergers and acquisitions, employee population shifts, fluctuations in market conditions, and industry challenges.

- Provides consulting expertise to local and global clients in multiple industries.

Hogan Assessment Systems – Tulsa, OK

2012 - Present

Lead Certification Facilitator & Executive Coach

One of the most successful and well-regarded assessment providers in the world, specializing in personality assessment to improve workplace performance.

- A member of Hogan's Elite Global Coaching Network.
- Facilitates Hogan Public Certification Workshops and Advanced Workshops to train and certify individuals to utilize Hogan Assessment tools.

Development Dimensions International – Detroit, MI

2008 - 2013

Executive Assessment Expert

Global talent management consulting firm with over 50 offices worldwide specializing in helping organizations align their people strategies to achieve business objectives.

- Conducted individual selection and developmental assessments for a multitude of companies across various industries worldwide.
- Created data-based recommendations for client selection decisions & provided comprehensive feedback utilizing cognitive, behavioral and personality data.
- Facilitated coaching to create development plans and enhance performance improvement.

EDUCATION

Texas A&M University – College Station, TX

Doctor of Philosophy (Ph.D.) – Industrial & Organizational Psychology

Texas A&M University – College Station, TX

Master of the Arts – Industrial & Organizational Psychology

Concordia University – Ann Arbor, MI

Bachelor of the Arts – Business & Psychology

PROFESSIONAL AFFILIATIONS & CERTIFICATIONS

- APA, SIOP, SCP, SPM, Human Synergistic accredited, OCE/OEI, DiSC & Birkman Certifications
- Institute of Coaching, McLean/Harvard Medical School Member
- ACE Coach Accelerator™ Enhanced Practitioner



Parker Sanders, Executive Search Consultant:

Parker Sanders is an Executive Search Consultant with Spirit Consulting and would provide sourcing and recruiting in this Executive Director search.

After graduating from Bucknell University Summa Cum Laude in the spring of 2021, Parker joined Spirit Consulting as a Junior Consultant and was promoted to Associate within six months. Parker was recently promoted again in November of 2022 to the status of Executive Search Consultant due to his ability to execute searches, build relationships, and grow industry networks. Parker has found quick success in the executive search industry, having supported Executive Director, HR Director, Regional Operations Leader, Clinical Chief, and Clinical Partner searches.

--- Resume to Follow ---



Parker Sanders

ps045@bucknell.edu

Education:

Bucknell University, College of Arts and Sciences

Lewisburg, PA

Bachelor of Arts, Double Major: Economics & Political Science; Minor: English

May 2021

- Graduated Summa Cum Laude (GPA: 3.90/4)

Achievements:

- *President's Award for Academic Excellence* (4.0 GPA over full academic year), *Order of Omega* (Greek Leadership Honor Society), *Pi Sigma Alpha* (Political Science Honor Society), *Alpha Lambda Delta* (First Year Honor Society)

Work Experience:

Spirit Consulting

Chicago, IL (Remote)
November 2021 - Present

Associate Consultant

- Provided full lifecycle recruitment and client management services
- Led client communication & coordination through all phases of search assignment, including intake and strategizing, presenting candidates, stewarding client interview processes, candidate selection, and offer negotiation
- Led candidate side operations, including sourcing, interviewing, selection, schedule coordination, providing feedback & updates, and offer negotiation
- Built and leveraged candidate & client relationships to grow business development network & sell services
- Developed & implemented a revamped onboarding program to ensure internal hire success
- Contributed to creation of marketing materials through collaborative and drafting processes
- Developed programs toward organizational success such as the creation of a client referral program to boost business development opportunities
- Contributed to thought leadership & decision making for the organization

Junior Consultant

June - November 2021

- Sourced, recruited, and interviewed qualified candidates; determined which to present to clients for consideration
- Created and delivered candidate presentations to clients
- Coordinated with candidates throughout search engagement to ensure positive experience
- Learned basics of sales & marketing to begin building business development network

Jensen, Marks, Langer & Vance LLC

Buffalo, NY

Wealth Management Intern

Summer 2019

Elmwood Village Association

Buffalo, NY

Community Engagement Coordinator

June - August 2018

- Hired midway through the summer from internship role to full-time position

Planning and Policy Intern

May & June 2018

Buffalo Common Council Internship

Buffalo, NY

Aide to Common Council Member Joel Feroletto

Summer 2017

Leadership and Community Involvement:

Delta Upsilon Fraternity

Lewisburg, PA

Founding President

September 2018 - December 2019

Skills and Interests:

- Relationship Building | Problem Solving | Writing | Research | Communication & Coordination
- J-24 Racing | Music & Film | Political History | Mental Health | Hiking | Football & Hockey



Project Methodology and Approach

The Spirit Consulting Way: Tailored Project Management

The *Spirit Consulting Way* is a tailored project management approach that allows us to follow a proven process, resulting in incredible success for you and your organization's next hire. By structuring our projects this way, you are given the freedom to pay for results as opposed to time.

Your investment is broken down into three payments, aligned with our three stages, and each predicated upon a successful deliverable:

- **Strategy** – Agreed upon statement of work
- **Execution** – After you interview two or more candidates
- **Close** – Signed offer letter and confirmed start date.

You are going to love the success of the new Executive Director that we hire for you, and you will rest easy with a **guarantee that is twice as long as the industry standard.**



Phase I: Strategy

INITIAL CONSULTATION

Each project begins with an intake meeting that includes the Board/Search Committee, SC Executive Team Member, and SC Project Lead. For this prospective engagement, we would hold this meeting within 7 days of the Go-Live date of any resulting contract. This step in the process consists of spending time onsite with our clients to build the framework for a successful search by conducting a thorough stakeholder analysis to include board members, employees, interested community members, and business leaders. Our meeting focus is on understanding our client's operations and objectives, culture, and the technical requirements of the role.



We also want to define the dimensions for job success, specific experiences, competencies, knowledge, and personal characteristics required to build a thorough candidate pipeline.

STATEMENT OF WORK

Prior to commencing the recruiting/interviewing on each search, we take the information gathered from the intake meeting and stakeholder analysis to create a customized Statement of Work, which includes our service level agreement, competitor and target research, a sample candidate matrix, and drafts of the search overview and timeline, role description, and interview questionnaire. A sample statement of work can be seen [here](#). We listed this client's statement of work as similar to yourselves, early learning coalitions are state funded, yet remain organized as a 501(c)3.

The Statement of Work includes a **service level agreement**, which aims to improve efficiency and service delivery in the executive search services provided by SC. This document outlines expectations from both the client organization and SC and increases communication throughout the process.

Within the Statement of Work, we provide **competitor and target research** – a sampling of the companies and organizations we might source candidates from for our client. SC will work with the client organization to identify a target market for pursuing candidates with the appropriate skill mix and educational background.

Prior to submitting a candidate presentation, we discuss qualifications and requirements of the role with our clients. We transpose this information into a **candidate matrix** – a table that allows our clients to see a side-by-side comparison of how each candidate compares to one another. These matrices are an essential part of our submission of candidates for consideration and are accompanied by candidate talking points to provide a summary of candidates' backgrounds, experience, and notable qualifications as well as our recommendations.

The **search overview** is a document that is generated from our project management software. It is a detailed, step-by-step guide that leads a search committee through an executive search process. To successfully complete an engagement within the proposed timeline, one of the biggest challenges is keeping everyone aligned and held accountable. Our search overviews allow a hiring manager the ability to plan each step along the way.

Additionally, we help our clients by recreating their **role descriptions**. We typically find that the versions we receive from our clients do not possess the right information, or they provide too much of the wrong information. While drafting our role descriptions, we make sure that we detail the company, summarize the role, and concisely list requirements, responsibilities, goals, and key challenges of the position.

Once the role description has been developed, we will create an **interview questionnaire** that is composed of traditional and behavioral-based questions. Our traditional questions are asked in all our engagements and have been perfected over many years of recruiting. The second portion of our interview guides consist of behavioral based interview questions. We feel the most accurate predictor of future performance is past performance, and we extract this information from candidates.

Phase II: Execution

CHANNELS OF SOURCING

Successful identification of exceptional talent requires active investigation and direct recruitment. Passive talent candidates are focused on driving results for their organizations, so to reach them, you must cut through the chaos of daily operations. We do so by leveraging the database we have built over the past 20 years and heavily focusing on cold outreach via LinkedIn, email, and phone/text, as well as utilizing artificial intelligence, paired with intelligence platforms, to automate candidate follow up. Further contacts are made through leveraging our network of professionals and former candidates for referrals. To provide additional channels, we pair our



passive-talent focus with job postings on [LinkedIn](#), Zip Recruiter, and our [own website](#) to leverage active talent options in the market. In 2022, 86% of our placed candidates came from the passive talent market; meaning our clients chose candidates we generated instead of ones that applied to job postings. We feel that it is important to have a robust recruitment strategy, instead of solely relying on candidates that apply through job postings.

CANDIDATE CONFIDENTIALITY

As we typically work predominantly with candidates with active employment, confidentiality is an area of strength for Spirit Consulting. We store candidate information only in our ATS and only disseminate this information to the hiring client. By keeping candidate information secure within a password protected platform available only to our firm, we have successfully avoided any lapses in confidentiality.

CANDIDATE SCREENING

We carefully screen and qualify all potential candidates to assess their qualifications, potential to perform within the new environment, and organizational compatibility. As potential candidates are identified, they are taken through an internal round of assessments prior to presentation. This initial pre-screen process allows us to pre-approve candidates and make stronger recommendations on which to consider. Additionally, we place heavy importance on discussing compensation in these early conversations to determine the candidate's willingness to accept an offer prior to submitting them for consideration. These screens include conducting reference, education, criminal, financial, media and civil litigation checks to present candidates who are the most qualified and best suited for consideration by your search committee.

PRESENTING CANDIDATES

After screening candidates, we send a [candidate presentation matrix with interview notes](#) and resumes (sample hyperlinked). This allows our clients to see a side-by-side comparison of how each candidate compares to one another based on the agreed upon qualifications uncovered during the initial consultation. **The slate of candidates is presented within 21 days of the search.** We then have a meeting with the client to discuss each recommended candidate's fit based on work experience, knowledge and skills, personal attributes, competencies, leadership abilities, and cultural fit. Our candidate recommendations align with the information we gathered from the stakeholder analysis. We also detail any concerns that we may have about a candidate so that we can consult you in narrowing in on the pool of applicants. After presenting candidates, we then administer Hogan Leadership Assessments and conduct thorough references on candidates to ensure that you spend your valuable time interviewing the best candidates available for your opening.

INTEGRATING I/O PSYCHOLOGY TO THE EVALUATION PROCESS

Screening, interviewing, and hiring applicants can be a difficult and resource-heavy process. Typically, you have relatively little information on candidates during the hiring process and will spend little more than a few hours with them before making an offer. The additional information you receive from our psychological assessments about potential employees will help in the decision-making process *pre-hire* and will help maximize your new employee's success *post-hire*, throughout the first year and beyond.

Before our clients interview candidates in-person, one of our Work Psychologist or Organizational Development Consultants administers a series of Hogan Leadership Assessments. The Hogan assessments help organizations by identifying characteristics that may impact an individual's job performance as well as his/her fit within a particular role, team, or organizational culture. The results of these assessments are summarized & shared with the hiring manager by our industrial/organizational psychologist prior to you in person interviewing candidates. A sample Hogan Assessment Summary can be seen [here](#). We ensure that you fully understand the information gathered from these Inventories so that you can make your hiring decisions with greater confidence. We implement these psychological assessments pre-hire as your partner in selecting, developing, and retaining individuals who will fit your organization's culture and can make lasting



contributions to its goals. We become an extension of your team. We help you to meet your hiring needs and accomplish your goals by providing insight, objectivity, and accountability.

SEARCH COMMITTEE INTERVIEW ASSISTANCE

We serve as collaborative advisors to our clients. If requested, we assist our clients with all final interviews and assessments, interview questions and candidate evaluation forms, and consult clients in ranking the candidates interviewed. SC has extensive experience working with a variety of search committees. We understand that some searches require extensive community involvement, and our team can adapt to the needs of all stakeholders involved in a search.

ENSURING A DIVERSE APPLICANT POOL

As a [Minority \(Latino\) Business Enterprise](#), Spirit Consulting uniquely values all that a multicultural workforce can offer. Therefore, we draw on our vast resources to find the best and brightest candidates while recruiting for and supporting our clientele. In looking at our diversity statistics for the past two years (graphs below), you can see that we averaged **73.48% diversity** in candidates presented, and **88.07% diversity** in candidates hired.

2021		
Demographics	Number Presented	% Presented Total
Men	110	42.80%
Women	147	57.20%
White	161	62.89%
Non-White	95	37.11%
Veteran	19	7.39%
Overall Diversity	176	68.48%
Undetermined	0	0.00%
Hired Demographics	Number Hired	% Hired Total
Men	11	57.89%
Women	8	42.11%
White	8	47.06%
Non-White	9	52.94%
Veteran	4	21.05%
Overall Diversity	17	89.47%
Undetermined	0	0.00%

2022		
Demographics	Number Presented	% Presented Total
Men	69	43.67%
Women	89	56.33%
White	89	60.14%
Non-White	59	39.86%
Veteran	5	3.16%
Overall Diversity	124	78.48%
Undetermined	1	0.63%
Hired Demographics	Number Hired	% Hired Total
Men	5	33.33%
Women	10	66.67%
White	9	60.0%
Non-White	6	40.00%
Veteran	1	6.67%
Overall Diversity	13	86.67%
Undetermined	0	0.00%



One of the [core values](#) of Spirit Consulting is Nobility; all people are created equal. This value is woven into who we are, so we treat others with the nobility they deserve and remain committed to hiring the **right leader** for each job.

Phase III: Close

EXTENDING OFFERS

We can assist our clients in offer negotiations. Our strong experience in this stage of the process allows us to negotiate all components of the offer effectively and quickly. We counsel both sides with the compensation package, contractual issues, and other specific details of employment, including relocation. Between our experience and emphasis on discussing these details with candidates throughout the process, we are in an ideal position to counsel both candidate and client regarding any counteroffer the candidate's current employer may extend.

CANDIDATE ONBOARDING/INTEGRATION ASSISTANCE

Our service extends well beyond the finalized offer. We stay in close contact with our clients and our client's hired candidate during the transition period to address any potential difficulties that may arise as well as to ensure a smooth transition; this occurs with reports at 30, 60, 90, and 180 days after placement. We have excelled by integrating work psychology into the executive search process, and Dr. Amie Rowe will conduct the Hogan leadership assessments and onboarding processes. Using the [Hogan Assessments](#), Dr. Rowe is able to anticipate how to best integrate the new candidate into the organization. The combination of Hogan Assessments as well as maintaining regular check-ins throughout a 180 day period helps both the candidate and the organization successfully transition.



Search Timeline

The following plan was customized and accommodates your pre-established board meetings. This timeline also gives our finalist Executive Director adequate time to give notice to their current employer and relocate. Throughout your Executive Director search, Spirit Consulting’s staff will play a key role in working with your Search Committee to determine what is needed to make this process successful and to work toward timely execution of tasks. **This is a proposed timeline** that provides an overview of the customized search process and may be modified to fit your recruitment needs and timeline. This total project is estimated to require 128 labor hours from Spirit Consulting’s staff.

Executive Director Search Timeline

Date	Day of the Week	Deliverable
Early May		State of West Virginia (SWV) Awards Spirit Consulting
05/19/23	Friday	Contract Confirmed, SC Stakeholder Analysis Completed, Statement of Work Completed, SWV Search Committee Signs SC’s Statement of Work
05/22/2023	Monday	SC Begins Recruitment
06/12/2023	Monday	SC Emails Candidate Presentation I
06/13/2023	Tuesday	Update Call #1 - Present Candidates to narrow for Reference Checks and Leadership Assessments
06/13 – 06/23	Tuesday – Friday	Reference Checks & Hogan Assessments Administered
06/27/2023	Tuesday	Update Call #2 – Present Finalists & Determine In Person Interview Schedule
06/28 - 07/14	Wednesday - Friday	Holiday Break & In-Person Interviews
07/18/23	Tuesday	Update Call #5 – Post Interview Debrief
07/19/23	Wednesday	SWV Extends Verbal Offer; Negotiation Begins
07/28/23	Friday	Executive Director Accepts Offer, Begins Relocation & Notice Period



Cost and Time

VENDOR: Spirit Consulting (“SC”) - **CLIENT:** State of West Virginia (“SWV”)

TIME: The proposed search timeline by Spirit Consulting outlines that candidates will be presented in 30 days from the start of the contract. In total it will take 70 days from the time our recruitment begins to the date the Executive Director executes the employment agreement.

COST: Spirit Consulting’s current pricing rates are 25% for executive search services and 7.5% for optional work psychology services. We are pleased to offer the WV First Foundation a 20% discount, on both services, as one of our CEO’s family friends is entangled in an opioid addiction, which has ruined his life and greatly affected his family. We would love to get behind this cause to find a leader who will administer justice on behalf of the victims and families that have suffered through this epidemic.

Therefore the total investment for execution of this search is equal to 20% of the hired candidate’s first year total compensation for executive search services, plus 6% of the hired candidate’s first year total compensation for optional work psychology services. Total compensation is defined as annual base salary, annual bonus projected at the maximum amount, and sign-on bonus. It excludes benefits or relocation. As a standard practice, we provide all clients with percentage based pricing terms. Due to the nature of this proposal, we are unable to set a fixed rate as pricing and job responsibilities are unclear. In addition to the pricing terms above, an additional \$5,000 is also requested to cover the expenses listed below. All invoices are due Net 10.

- I. SWV will remit the first one-third of the total executive search fee and one-half of the work psychology services fee upon signing by both parties upon submittal of the SC work plan. The payment is a non-refundable retainer.
- II. SWV will remit a second non-refundable retainer installment of one-third of the executive search fee and one-fourth of the work psychology fee after presentation and acceptance of two or more candidates that SWV has moved forward in the interview process. Any and/or all three interview types (phone, video and/or in-person interview) will trigger the second non-refundable retainer installment.
- III. SWV will remit the remainder of the executive search and work psychology services fees after the successful candidate’s signing of an offer letter and mutually agreed upon start date or 70 days after execution of SC’s agreement; this final invoice will be triggered by either occurrence. The final portion of the executive search and work psychology fees will be adjusted based on actual compensation.

EXPENSES: SWV agrees to submit \$5,000 to cover the following expenses:

- I. SC employee travel expenses for interviews or search-related meetings including airfare, gasoline, meals, lodging, parking, tolls, taxi, or car rental.
- II. Candidate travel expenses for interviews with SC or SWV, including airfare, gasoline, meals, lodging, parking, tolls, taxi, or car rental.
- III. All required candidate background checks requested by the client.

PLACEMENT GUARANTEE: **Within the first 24 months of employment**, if the hired candidate is asked to leave for under-performance, provided there has not been a material change in the nature, location, or reporting structure of the position, we will relaunch a search for a new candidate under the original role specifications. In such a case, **we will do so for no additional professional fee**, though charging expenses as provided for in this original search. If the nature, location, or reporting structure has changed materially since we closed on the



original hire, we will need to mutually agree on a revised role specification and a new fee structure. The 24-month guarantee requires utilization of work psychology services - not simply procuring the service.

WORK PSYCHOLOGY: Work Psychology Assessments are comprised of Hogan Assessments, with a write-up and consultations conducted after candidates' initial interviews with client, and are performed by certified Industrial Organizational Psychologists. Onboarding & Integration services are performed by Industrial Organizational Psychologists and occur at 30, 60, 90, and 180 days after placement.

WORK AGREEMENT AND CLIENT PARTICIPATION: SC will assist SWV to recruit, hire and onboard for the assigned positions. SWV gives SC permission to post these roles. If SWV decides to postpone a search after it has commenced, upon resumption of the search, a new fee arrangement may need to be mutually agreed between us.

ADDITIONAL HIRES: If any candidate submitted for SWV's consideration is subsequently hired for a position outside of this agreement within 12 months of the completion of this search, a fee will be due to SC. The fee for an adjunct hire of this type will be 20% of the candidate's first year's total compensation. Total compensation is defined as annual base salary, annual bonus projected at the maximum amount, and sign-on bonus. It excludes benefits or relocation.

CONFIDENTIAL INFORMATION:

SC Search Candidates are referred by SC to SWV in confidence. The fee is payable to SC should SWV or its affiliates engage a SC Search Candidate for any position within one year after our most recent documented communication relating to such SC Search Candidate. Should SWV refer or otherwise identify such a SC Search Candidate to an affiliated company or division, and the affiliated company or division hires the SC Search Candidate, SWV and the hiring company shall be responsible for the payment of the fee outlined above.

NON-SOLICITATION:

During the term of this Agreement, SC will not actively solicit, recruit, or hire any SWV employees for employment by SC for other recruiting purposes. In addition, SC will not actively solicit, recruit, or hire any Hired Candidate from the employment of SWV during the term of this agreement. **SC will also not actively solicit, recruit or hire the final candidate as long as they are employed by the State of West Virginia.**

EXCLUSIVITY:

SC establishes an exclusive consulting agreement with its clients. We expect our clients not to advertise or to use a competing organization on the same engagement during the period of our involvement. Any internally generated candidates will be expected to engage and participate in Spirit Consulting's process. Unnecessary duplication puts all parties in a potentially embarrassing situation and may result in the downgrading of the position in the eyes of potential candidates. If such an event occurs, it is our policy to discontinue our search efforts immediately and to bill the full amount for the engagement.

INDEMNIFICATION:

Both parties mutually agree to indemnify and hold each other harmless from and against all liability, losses, damages, claims, causes of action, costs, or expenses (including reasonable attorneys' fees), which directly or indirectly arise from the performance of the Services hereunder by the indemnifying party, its agents, servants, representatives and/or employees.



References

Reference #1

Entity Name: [Early Learning Coalition of Southwest Florida](#)

Organization Info: State Funded Non Profit, \$110MM, 64 Employees, 12K children & families served

Contact Person's Name: [Dr. Kelly Roy](#)

Title: Interim Board Chair

Phone Number: [REDACTED]

Email Address: kellyRKRoy@gmail.com

Scope of Services: CEO Executive Search & Work Psychology Services

Video Testimonial Hyperlink: <https://youtu.be/kOYBDxYpPPs>



Reference #2

Entity Name: [Early Learning Coalition of Hillsborough County](#)

Organization Info: State Funded Non Profit, \$330MM, 155 Employees, 20K children & families served

Contact Person's Name: Dr. Stephanie Johnson

Title: Board Secretary/Search Committee Member

Phone Number: [REDACTED] cell

Email Address: stephie@hecedu.com

Scope of Services: CEO Executive Search & Work Psychology Services

Video Testimonial: <https://youtu.be/Gy2jRu-MrU8>



Reference #3

Entity Name: [Ronald McDonald House Charities](#)

Organization Info: National Non Profit, 145 Chapters Nationally, \$104MM Revenue, \$217MM Net Assets

Contact Person's Name: [Rick Barbieri](#),

Title: Associate Director of Field Operations

Phone Number: [REDACTED]

Email Address: Rick.Barbieri@us.mcd.com

Scope: Three (3) Chapter Executive Director Searches



Reference #4

Entity Name: [Duke University Health System](#)

Organization Info: Non Profit Health System, \$6.78B, 65K Employees

Contact Person's Name: Rhonda Brandon

Title: Chief Human Resources Officer

Email Address: Rhonda.Brandon@duke.edu

Scope of Services: 40 Leadership and Executive Searches, Organizational Development, Work Psychology, & Executive Coaching Services

Video Testimonial:

<https://youtu.be/v2D5xxFOfeQ>



Reference #5

Entity Name: [Children's Hospital of Philadelphia](#)

Organization Info: Non Profit Children's Hospital, \$3.4B, 16.8K employees

Contact Person's Name: [Fabian Stone](#)

Title: Vice President of Revenue Cycle

Address: [REDACTED]

Email Address: stonef@chop.edu

Scope of Services: Executive Search, Organizational Development, Work Psychology, & Executive Coaching Services

Video Testimonial: https://youtu.be/L6rtU1O_SdA



DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Christopher Gomez, Chief Executive Officer


(Address) Spirit Consulting #3668 111 North Wabash Ave. Ste. 100 Chicago, IL 60602

(Phone Number) / (Fax Number) 630-686-1414 / 312-277-7592

(Email address) cgomez@spiritmco.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

Spirit Consulting
(Company) 

(Signature of Authorized Representative)
Christopher Gomez CEO 4/24/2023

(Printed Name and Title of Authorized Representative) (Date)
P: 630-686-1414 F: 312-277-7592

(Phone Number) (Fax Number)
cgomez@spiritmco.com

(Email Address)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ AGU23-002

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- Addendum No. 1
- Addendum No. 2
- Addendum No. 3
- Addendum No. 4
- Addendum No. 5

- Addendum No. 6
- Addendum No. 7
- Addendum No. 8
- Addendum No. 9
- Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Spirit Consulting

Company



Authorized Signature

4/24/2023

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.