



Request for Proposals for Executive Search Firm

California Citrus Research Board
Post Office Box 230
Visalia, California 93279
<http://www.citrusresearch.org/>

December 20, 2018	RFP Issued
January 4, 2019 By 5:00 PM Pacific Time	Letter of Intent to Bid Due
January 18, 2019 by 5:00 PM Pacific Time	RFP Responses Due

1 Introduction

1.1 Summary

The California Citrus Research Board (“CRB”) is issuing this Request for Proposals for the services of an Executive Search Firm (“RFP”) to solicit responses from firms interested in providing services related to identifying potential candidates for the position of CRB President (“Executive Search Services”). After careful review of responses received and associated due diligence performed by the Board of Directors of the CRB (“Board”), the Board will select one firm to perform the below- described Executive Search Services.

Respondents will be competing against each other for selection to provide the Executive Search Services as more fully described in Section 2. The submissions of all Respondent firms shall be compared and evaluated pursuant to the evaluation criteria set forth in this RFP.

RESPONDENTS PLEASE NOTE:

- Selection of a Respondent under this RFP does not commit the CRB to procuring any services pursuant to this RFP.
- The CRB will negotiate contract terms upon selection. All contracts are subject to review by CRB legal counsel and approval by the CRB Board. A firm will be awarded the work upon signing of a Contract, which outlines terms, scope, budget and other necessary items. CRB reserves the right to reject all proposals.

1.2 The California Citrus Research Board

The Citrus Research Board (CRB) is a quasi-public agency under the umbrella of the California Department of Food and Agriculture (CDFA). CRB administers the California Citrus Research Program, the grower-funded and grower-directed program established in 1968 enabling the State’s citrus producers to sponsor and support needed citrus research. The CRB is headquartered in Visalia, California and operates two scientific laboratory’s in Riverside, California.

2 Services Required

2.1 Context

The CRB is seeking to procure the services of an Executive Search Firm, capable of conducting a search for candidates qualified to serve as the CRB President.

2.2 Scope of Services

The Executive Search Firm shall assist the CRB in attracting, interviewing, and hiring a President for the CRB. The President of the CRB will oversee the many aspects of its management to ensure the CRB meets its goal of ensuring a sustainable California citrus industry for the benefit of growers by prioritizing, investing in and promoting sound science. He/She will build on the success of the CRB, which has been nationally recognized for its successful programs. Specific duties include working with the CRB Board to optimize achievement of the mission; engaging with all aspects of state and national citrus leaders; managing the executive and administrative operating team; establishing and growing relationships with stakeholders including those at industry associations and industry executives at national, state and local levels.

The services that will be required shall include:

- Solicit input from the Board, or a sub-committee thereof, through meetings and/or interviews to understand the role, responsibilities, qualifications and appropriate experience needed for the position.

- Develop a recruitment strategy, process and timetable for completion of the work in consultation with the Board's Search Committee.
- Assist to develop an accurate and enticing job description. A Job Description for the President is included as Attachment A.
- Source job candidates through a number of different channels including advertising in nationally-recognized publications likely to attract qualified candidates, proactively reaching out to candidates in the marketplace that may not be actively seeking the position, accessing the firm's network of qualified C-level candidates and other best practice recruitment strategies utilized in the industry.
- Assess the qualifications of interested candidates against those required in the Job Description and recommend potential candidates for interview to the Board's Search Committee.
- Support the Board's Search Committee in engaging in a rigorous interview, reference-checking and hiring process to select the best candidate.

3 Submission of Responses

3.1 Schedule

- (a) The RFP process will proceed according to the following anticipated schedule:

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- (b) **Responses will be due no later than 5:00 PM Pacific Time on Friday, January 18, 2019.** Responses received later than the date and time specified will not be considered. CRB assumes no responsibility or liability for late delivery or receipt of responses.
- (c) The responses will be evaluated pursuant to the criteria set forth in this RFP. Notification of selection or non-selection of all Respondents who submitted conforming responses will be mailed when the selection process is final.

3.2 **Questions**

Questions regarding this RFP must be submitted to: franco@citrusresearch.org

Instructions for Submission of Responses

Respondents are cautioned to read carefully and conform to the requirements of this RFP. Failure to comply with the provisions of this RFP may serve as grounds for rejection of a response.

- (a) All responses must be submitted electronically in .pdf format to:
franco@citrusresearch.org
- (b) A statement indicating compliance with the terms, conditions and specifications contained in this RFP must be presented in the response. Submission of the signed Authorized Respondent's Signature and Acceptance Form (Attachment B) shall satisfy this requirement.

3.3 **Information Required**

- (a) Executive Summary: Respondents should provide a summary of their organization, their qualifications and their proposed approach for working with the CRB. This summary should be a maximum of 2 pages in length.
- (b) Statement of Firm Qualifications: All responses must include a statement of qualifications, experience and description of the Respondent firm and its history. The response should specifically indicate the firm's current and historical expertise in providing the Executive Search Services identified in the RFP.
- (c) Staff Qualifications: All responses must include names and titles of each individual who will be providing the Executive Search Services under any work order, as well as written descriptions of the individual's experience. All Respondents must identify the individual(s) who will have primary responsibility for contact and communications with the CRB and the person who is authorized to negotiate and contractually-bind Respondent. The CRB reserves the right to investigate and review the background of any or all personnel assigned to work under the Contract, including any work orders thereto, and, based on such investigations, to reject the use of any persons within the CRB's discretion.
- (d) Approach: All responses should include a plan for performing the services which articulates what services and the level of effort that would be required for the initial engagement and what services would be required for future engagements.
- (e) Billing Rates and Structure:
Respondents are required to include the following information in their response:
Respondent shall provide a cost proposal for their Executive Search Services.
 - As part of the cost proposal, please list each person that may perform services and their title, the proposed rate or blended hourly rate proposed, and the level of involvement anticipated for each component.
- (f) References: All responses must include references from at least 3 clients of the firm, and preferably clients who have utilized the firm on matters related to Executive Search Services. The references must include a contact person, a full address, and a phone number.

4 Evaluation Process and Criteria

The CRB shall evaluate each Response that is properly submitted. After submission and review of Responses, interviews may be requested. Selection of a Respondent to provide the Executive Search Services will be based on the following criteria:

- (a) Experience and qualifications of the firm, and more specifically individual team members to be assigned to the engagement, in performing Executive Search Services for similar governmental and/or private organizations.
- (b) Proposal's responsiveness to RFP requirements.
- (c) Firm and staff's competence and knowledge demonstrated during the interview process, if applicable.
- (d) Price

While the order of these factors does not generally denote relative importance, CRB acknowledges that selecting best value providers primarily requires a balanced combination of (1) reasonable rates and the availability of flat fees, blended rates and caps on fees, and (2) strong experience and demonstrated expertise in providing Executive Search Services.

The CRB reserves the right to consider such other relevant factors as it deems appropriate in order to hire the best value provider of the Executive Search Services. The CRB may or may not seek additional information from Respondents prior to making a selection.

This RFP does not commit CRB to select any firm, award any work order, pay any costs incurred in preparing a response, or procure or contract for any services or supplies. CRB reserves the right to accept or reject any or all submittals received, cancel or modify the RFP in part or in its entirety, or change the RFP guidelines, when it is in the best interests of CRB to do so.

5 **Other Provisions**

5.1 **General Information**

- a) It is the policy of CRB that contracts are awarded only to responsive and responsible Respondents. In order to qualify as responsive, the Respondent must respond to all requirements of the RFP in a complete and thorough manner. In order to qualify as responsible, the Respondent must demonstrate: (1) the availability of adequate resources and staffing to efficiently and expeditiously service CRB's needs; (2) the necessary experience, organization, qualifications, skills and facilities to provide the types of Executive Search Services set forth in this RFP; (3) a satisfactory record of performance in the provision of the Executive Search Services set forth in this RFP; (4) the ability and willingness to comply with the requirements of Federal and State law relative to equal employment opportunity. **ANY PROPOSAL DETERMINED TO BE NON-RESPONSIVE TO THIS RFP, INCLUDING INSTRUCTIONS GOVERNING THE SUBMISSION OF PROPOSALS, WILL BE DISQUALIFIED WITHOUT EVALUATION UNLESS THE EVALUATION COMMITTEE DETERMINES THAT THE NONCOMPLIANCE IS INSUBSTANTIAL.**
- b) CRB makes no guarantee that any Executive Search Services will be purchased pursuant to any Contract entered into with Respondent as a result of this RFP.
- c) Unless otherwise specified in this RFP, all communications, responses, and documentation must be in English, and all cost proposals or figures in U.S. currency. All responses must be submitted in accordance with the specific terms of this RFP.
- d) Respondents are prohibited from communicating directly with any employee of CRB except as specified in this RFP, and no other individual employee or representative is authorized to provide any information or respond to any questions or inquiries concerning this RFP.
- e) The goal of this RFP is to select and enter into a Contract with the Respondent that will provide the best value of Executive Search Services to achieve the procurement goals of the CRB. Respondents are therefore invited to propose alternatives which provide substantially better or more cost-effective performance than achievable under a stated RFP specification.
- f) Costs that are not specifically identified in the Respondent's response and/or not specifically accepted by CRB as part of the Contract will not be compensated under any contract awarded pursuant to this RFP. CRB shall not be responsible for any costs or expenses incurred by Respondents in responding to this RFP.
- g) Respondent's submitted Response shall be treated by CRB as an accurate statement of Respondent's capabilities and experience. Should any statement asserted by Respondent prove to be inaccurate or inconsistent with the foregoing, such inaccuracy or inconsistency shall constitute sufficient cause for rejection of the Response and/or of any resulting contract. The RFP evaluation committee will rule on any such matters and will determine appropriate action.
- h) If the CRB determines that it is necessary to revise any part of this RFP, or if additional data is necessary to clarify any of its provisions, a supplement will be posted to the CRB's website. CRB's RFP evaluation personnel reserve the right to amend the RFP at any time prior to the deadline for submission of responses.
- i) Submitted Responses must be valid in all respects for a minimum period of sixty (60) days after the deadline for submission.
- j) CRB's prior approval is required for any subcontracted services under any Contract entered into as a result of this RFP. Selected Respondents are responsible for the satisfactory performance and adequate oversight of their subcontractors. Subcontractors are required to meet the same requirements and are held to the same reimbursable cost standards as the selected Respondents.
- k) The Contract and work orders entered into as a result of this RFP shall be on a fee for service basis. It is anticipated that CRB shall select one Respondent to this RFP and intends to enter into a Contract with one Respondent. It is anticipated that the term of the Contract entered into pursuant to this RFP will be for a term of at least three months, with CRB options to renew it in its discretion.

5.2 Waiver Authority

CRB reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to request modifications of the response, to accept or reject any or all responses received, and/or to cancel all or part of this RFP at any time prior to awards.

5.3 Disclaimer

This RFP does not commit the CRB to award any funds, pay any costs incurred in preparing a response, or procure or contract for services or supplies. The CRB reserves the right to accept or reject any or all responses received, negotiate with all qualified Respondents, cancel or modify the RFP in part or in its entirety, or change the response guidelines, when it is in its best interests.

5.4 Changes/Amendments to RFP

This RFP has been distributed electronically using the CRB's website. It is the responsibility of respondents to check the CRB's website for any addenda or modifications to a RFP to which they intend to respond. The CRB accepts no liability and will provide no accommodation to Respondents who submit a response based on an out-of-date RFP document.

ATTACHMENT A

JOB DESCRIPTION FOR CRB PRESIDENT

JOB TITLE	President
DEPARTMENT	Administration
REPORTS TO	Chairman of the Citrus Research Board (CRB)
CLASSIFICATION	Full time; exempt
LOCATION	Visalia, California

SUMMARY

The Citrus Research Program is a grower-funded and grower-directed science and technology program established in 1968 under the California Marketing Act as a mechanism for enabling California citrus growers to sponsor and support needed scientific and technical research to further the goals of their industry. Much of this work is accomplished through funding that is awarded to research projects by the program administrator, the Citrus Research Board (CRB).

The CRB President works at the pleasure of the 21-member board, comprised of 20 citrus producers and one public member. The President is responsible for development of the organization's program of research and development work, its annual budget, and long-range strategic planning and oversight. This position is tasked with, in conjunction with the Director of Communications, all formal communications released to the public, while providing operational direction across all departments both at the main office in Visalia, CA and the various laboratory locations located in Riverside, CA.

The President also works in close collaboration with organizations such as California Citrus Mutual (CCM), the Citrus Research & Development Foundation (CRDF), the California Citrus Quality Council (CCQC), the Citrus Clonal Protection Program (CCPP), Sunkist Growers, USDA Agricultural Research Service (ARS), USDA Animal and Plant Health Inspection Service (APHIS), University of California Division of Agriculture and Natural Resources (UC ANR), the Citrus Pest & Disease Protection Committee (CPDPC) and Multi-Agency Coordinating Group (MAC) and others.

The CRB President informs the Board of challenges and opportunities in its role as the citrus pest & disease research, development and implementation organization working on behalf of all California citrus growers. The President utilizes assets at their disposal to be an industry innovator, problem-solver and leader regarding these matters, and other initiatives as directed by the Board.

JOB DUTIES

Duties of the President include (but are not limited to) the following activities:

Strategic

- Upon joining, collaborate with the Board to undertake an organizational review, including strategy, structure, priorities, processes and staffing.
- Provide operational direction and guidance relative to the financial viability of the organization. The President is responsible for budget development and performance, investment of reserve funds, collection of assessments, grants and awards, and the payment of research project awards as properly invoiced by research organizations.
- Provide direction and supervision to the research department in their efforts to solicit top-notch citrus research proposals and solve major industry challenges.
- Serve as the public relations and media spokesperson along with the Chairman of the Board relative to citrus research issues.
- Serve as Executive Editor of *Citrograph* magazine, a quarterly publication detailing the work of the CRB and the progress of many of the research projects it funds. This includes the proper allocation of resources to perform the annual work plan in producing the major communications tool of the organization.
- Provide guidance and direction to the communications department in the planning and production of CRB events such as the California Citrus Conference, International Research Conference on Huanglongbing, grower seminars, the Post-Harvest Conference, and others.
- Serve as an advisory member of the Citrus Pest & Disease Prevention Committee and USDA's HLB MAC. Represents the California citrus industry on monthly Citrus Health Response Program conference calls.
- Understand the importance of deadlines for sponsored research, including intellectual property notifications, in collaboration with CRB's IP legal counsel.
- Be actively aware of the CRB-sponsored research that will lead to implementation, commercialization and adoption, and facilitate the transfer of such technology to California citrus growers for use.
- Participate in negotiating the details of agreements with technology transfer entities (universities, USDA, corporations, etc.).
- Support efforts regarding business and new product development, including investment and licensing.
- Other duties as assigned by the Board, various committees, and Board members, including the Chairman of the Board.

Tactical

- Staff the organization, which includes setting the hiring process, compensation levels, performance & accountability, training, mentoring, coaching, discipline and termination of staff when necessary.
- Supervise, communicate with and motivate all staff and departments (Finance & Accounting, Research, Contracts & Grants, Data Management, Information Technology, Communications, a diagnostic laboratory and a biocontrol research & production laboratory).
- Conduct the annual grower nomination meetings, held in 3 districts around California.
- Travel throughout the state, to Washington, DC and to other citrus producing regions representing the California citrus industry.
- Properly administer all policies, procedures and actions that the Board adopts and undertakes, and that the Marketing Order requires.
- Ensure compliance with the state of California relative to the Bagley-Keene act open meeting rules. This includes working with staff to ensure proper meeting notices are posted for over 50 board and committee meetings per year, along with the drafting and submission of meeting minutes.

QUALIFICATIONS

Skills

- Excellent organizational and leadership abilities.
- Ability to clearly and effectively communicate with growers, packing house professionals, government officials, researchers and the media.
- Demonstrated ability to write, understand and critically review and edit technical and research articles.
- Critical thinking, collaboration and problem-solving skills.
- Good people skills, ability to interact positively with a diverse set of people.
- Excellent communication skills, both written and verbal.
- Intellectual property and technology management expertise.
- Ability to effectively use modern digital productivity tools such as Microsoft Office and Dropbox.

Experience & Education

A combination of experience and education that provide the required knowledge, skill, and abilities is required. This would typically include:

- University degree in agriculture, business, organizational leadership and/or communications; with preference given to candidates with an advanced degree.
- Minimum of 10 years of experience working with a marketing order or similar organizational management experience.
- General understanding of research administration, funding and problem-solving.
- Familiarity with federal and state marketing orders.

SPECIAL REQUIREMENTS

- Possession of a valid California Driver's License with a clean driving record.
- Occasional out-of-town, multi-day business trips may be necessary.

Work Environment

This job typically operates in an office setting, but frequently requires travel to meetings and events in Central and Southern California, as well as to Sacramento and Washington, DC. This role routinely uses standard office equipment such as computers, phones, and photocopiers.

Physical Demands

This position is mainly one in an office, but some exposure to laboratory environments occur. Walking of research plots and/or citrus groves may be encountered.

EOE STATEMENT

The CRB is an equal employment opportunity employer. All employees are valued without regard to race, color, national origin, gender, age, marital status, religion, disability, sexual orientation, pregnancy, or veteran status or other

ATTACHMENT B
AUTHORIZED RESPONDENT'S SIGNATURE AND ACCEPTANCE FORM

The undersigned is a duly authorized representative of the Respondent listed below. The Respondent has read and understands the RFP requirements. The Respondent acknowledges that all of the terms and conditions of the RFP are mandatory, and that Respondent's response is compliant with such requirements. The Respondent specifically acknowledges the application of the procedures regarding disclosure of sensitive information as set forth in Attachment B of the RFP, and specifically agrees that it shall be bound by those procedures.

The Respondent understands that, if selected by the CRB, the Respondent and the CRB will execute a Contract.

Respondent agrees that the entire bid response will remain valid for sixty (60) days from receipt by the CRB.

I certify that Respondent is in compliance with all corporate filing requirements and State tax laws.

I further certify that the statements made in this Response to the RFP, including all attachments and exhibits, are true and correct to the best of my knowledge.

Respondent: _____
(Printed Name of Respondent)

By: _____
(Signature of Authorized Representative)

Name: _____

Title: _____

Date: _____