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choices,
our
advice.**

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 **VonLehman**
CPA & ADVISORY FIRM



a proposal to provide human resources consulting services to:

BOONE COUNTY SCHOOLS

September 24, 2020

contact:

DEIRDRE BIRD, Director, HR Consulting Services
dbird@vlcpa.com

810 Wright's Summit Parkway, Suite 300
Fort Wright, KY 41011
859-331-3300

September 24, 2020

Linda Schild
Eric Ball
Boone County Schools
8330 U.S. Hwy 42
Florence, KY 41042

Dear Linda and Eric,

Thank you again for making time to talk with Erin and me this morning. We appreciate the opportunity to propose on Boone County Schools' accounting search needs. This letter and proposal are in follow-up to our conversation to provide an overview of our services and our team. Based on our conversation, we can help with Boone County Schools' accounting/finance search.

Since 1946, our team has worked with regional organizations, assisting them in critical aspects of their organization's growth and success and helping them to achieve their goals. VonLehman becomes an extension of your team, helping to better leverage your resources and allowing Boone County Schools to focus on growing their organization.

We greatly appreciate the opportunity for our HR Consulting team to continue a relationship with Boone County Schools. If you have any questions, please don't hesitate to contact me at 513.260.6185 or dbird@vlcpa.com!

Sincerely,

A handwritten signature in black ink, appearing to read "Deirdre Bird", with a long horizontal flourish extending to the right.

Deirdre Bird
Director, HR Consulting Services



executive summary

VonLehman provides strategic human resource services to clients throughout various industry sectors that drive our regional economy. By focusing on three pivotal aspects – organization, talent and transformation, our HR Consulting group helps organizations steward their most valuable assets in an ever-changing organizational climate.

Our goal is to understand Boone County Schools' needs and apply our expertise to help achieve the desired outcomes. Here are a few reasons why we believe VonLehman is the right choice for Boone County Schools:

OUR EXECUTIVE SEARCH ENGAGEMENT PROCESS

Our process follows a proven, customized approach for each of our customers. Beginning with the client intake phase, our professionals collaborate closely with you and the Boone County Schools team to gain a comprehensive understanding of the culture and success factors associated with the respective role. Next, we selectively source active and passive candidates in our network. We will conduct a comprehensive vetting and interview process to identify a plurality of viable candidates who meet the job specification. From here, we can assist you and the Boone County Schools team in coordinating and evaluating candidates through the organization's final interview process. Our efficient recruitment process dramatically reduces the risk of expensive hiring mistakes and time commitment on your end.

RELATED EXPERIENCE

VonLehman's HR Consulting team has supported numerous organizations with talent acquisition services for roles similar to the Boone County Schools accounting/finance role. A sample of these organizations includes: University of Cincinnati Research Institute, Legal Aid of the Bluegrass, Raybourne Group International, and Caracole. We perform all services using our in-house staff and do not subcontract to outside firms. Our team can supply you with insight from successes and challenges at similar organizations, whenever asked, whenever needed. We believe the long lasting relationships we have with our clients provide us unmatched experience above our competitors.

YOUR CHOICES, OUR ADVICE

Our team collaborates with clients, becoming an extension of their staff, in order to anticipate their changing organizational and employment needs, develop talent across functional areas and avoid costly employment and culture related problems. Whether a client's organizational, talent or transformation challenges are internally or externally driven, our team can help to assess and implement solutions that align with the organization's strategy, helping to drive success at every level. Additional services provided by our team include:

- > Human Resources on Demand
- > Employee Handbook Development
- > Organizational Development
- > Management and Leadership Development

Our Human Resources on Demand services range from serving as a sounding board and coach, to providing additional capacity and expertise.



your team



focus

hr consulting
transformation
org design
strategic planning
succession
comp design
retention strategies

deirdre bird

DIRECTOR, HR CONSULTING, **PHR, SHRM-CP**

Kentucky Office
513.260.6185
dbird@vlcpa.com

Deirdre Bird has over 20 years of human resources management and management consulting experience. She works closely with clients in multiple industries on all things HR, including facilitating organizational design, succession planning, performance management, recruiting, coaching, and development. Deirdre engages with organization leadership of small and mid-sized organizations to develop highly customized solutions that achieve organizational goals and impact bottom-line performance.

She has previous experience working for large media organizations, directing and managing HR operations focused on training. What distinguishes her from others in her field of expertise is her passion for enhancing organizations' and employees' effectiveness through talent.

EDUCATION

University of North Carolina at Chapel Hill, B.A., Journalism
Xavier University, M.S., HR Development

PROFESSIONAL & CIVIC AFFILIATIONS

(PRESENT AND FORMER)

Society for Human Resource Management
Greater Cincinnati Human Resources Association
Association for Talent Development
Anderson High School PTO (Treasurer)
Forest Hills Foundation for Education
CISV



focus

hr consulting
strategic planning
succession
talent management

erin young

HR CONSULTANT, **SHRM-CP**

Kentucky Office
859.331.3300
eyoung@vlcpa.com

Erin Young brings over 10 years of human resources experience to our team, with a specialization in talent management, including workforce planning, recruiting, training, performance management, employee development, employee engagement, and succession planning. In her former roles, she gained a wealth of experience in managing employee relations, strategic planning and succession, tackling compliance issues, and technology selection and implementation.

Erin is passionate about helping organizations make the most of their resources and talent, through a tailored and personalized approach.

EDUCATION

Morehead State University, B.B.A., Business Administration
Xavier University, M.S., HR Development

PROFESSIONAL & CIVIC AFFILIATIONS

(PRESENT AND FORMER)

Society for Human Resource Management
Northern Kentucky Society for Human Resource Management
Greater Cincinnati Human Resources Association
Association for Talent Development



our services and pricing

SCOPE OF SERVICES

VonLehman will facilitate and coordinate the design, sourcing and recruiting of the accounting / finance role to be chosen for hire by Boone County Schools. The targeted search will be based on the job specification. This is a full-service partnership for success. Activities in the scope will include the search design, sourcing, review of resumes, phone screenings, in-person interviews, regular status updates, and interview facilitation, coordination and deliberation with Boone County Schools on interview day.

PROPOSED PRICING

We propose a time and material project at a discounted rate of \$160 per hour (\$250 per hour standard rate) with at not-to-exceed amount of \$14,700 for services in scope. Boone County Schools will reimburse VonLehman for reasonable direct out of pocket expenses such as travel related to the execution of this project. Fees for all services will be based on VonLehman's standard monthly billing practices.



service agreement

CLIENT: Boone County Schools

DATE: September 24, 2020

This Consulting Services Agreement ("Agreement") entered into on the date stated above, by Boone County Schools ("Client") and VonLehman & Company Inc. ("VonLehman"). VonLehman shall perform the services (the "Services") set forth in the Scope of Services below subject to the terms and conditions of this Agreement:

Project Name	Retained Search – accounting / finance role
Estimated Timing	Start September, 2020 and end December, 2020. This is an estimate of timing.
Scope of Services	VonLehman will facilitate and coordinate the design, sourcing and recruiting of an accounting / finance role to be chosen for hire by Client. The targeted search will be based on the job specification. This is a full-service partnership for success. Activities in scope will include the search design, sourcing, review of resumes, phone screenings, in-person interviews, regular status updates, and interview facilitation, coordination and deliberation with Client on interview day. To the greatest extent possible, Client's personnel will be expedient in supporting this project.
Estimated Fees	This is a time and material project at a discounted rate of \$160 per hour, with a not-to-exceed amount of \$14,700 for the Services (this is an estimate only and Client acknowledges the fees for the Services may be lower than this estimated amount). Billing will be monthly.

SERVICES, FEES AND PERSONNEL

- Any change in the Services ("Additional Services") and the fees for Additional Services shall be agreed upon in a writing signed by Client and VonLehman prior to the commencement of the work, and neither party will be obligated to the other as to any Additional Services without such writing.
- As consideration for the performance of the Services, Client shall pay VonLehman the fees set forth and summarized above (the "Fees"). Fees for the Services will be based on VonLehman's standard monthly billing practices. A 20% retainer will be billed upon the execution of this Agreement. Post-commencement cancellation or placing a "hold" on the project will result in surrender of the retainer.
- All invoices are payable forty-five (45) days after receipt. In addition to the Fees, applicable taxes required under law for the Services may apply. Invoices paid late will have a 1.5% service charge added each month. VonLehman may withdraw from this engagement and cease performing Services if Fees remain unpaid in excess of 90 days from the date of billing, in which case VonLehman will have no further liability hereunder.
- Client will reimburse VonLehman for reasonable direct out of pocket expenses, including, but not limited to, travel approved by Client to and from Client site.
- Client is prohibited from soliciting or employing VonLehman personnel during the term of this Agreement and for a period of 12 months following the completion of the Services. Should Client violate this prohibition, Client shall reimburse VonLehman an amount equal to the total salary and expenses incurred for the last 3 months of the personnel's employment with VonLehman.

CONFIDENTIALITY, INTELLECTUAL PROPERTY, WARRANTY AND LIMITATION OF LIABILITY

- The parties agree not to disclose to third parties (or employees without a need to know) information received from the other party which has been marked as confidential. Each party shall safeguard the other party's information in the same standard of care employed for its own information.
- The parties agree that work product created under this Agreement shall be owned by both parties. Notwithstanding the foregoing or anything in this Agreement to the contrary, intellectual property owned by either party prior to this Agreement shall be owned exclusively by the originating party.
- The provisions of this Section allocate the bargained for risks under this Agreement between VonLehman and Client. Client has agreed to accept the risk of these damages in consideration of the price and other material terms of the Agreement. Client's sole and exclusive remedy for any breach of this Agreement by VonLehman will be to cancel this Agreement and receive a pro-rata refund of any Fees paid in advance.
- This Agreement shall be governed by and construed under the laws of the State of Kentucky without regard to its conflicts of law principles.
- If any provision of this Agreement is held by a court of competent jurisdiction to be unenforceable, such unenforceability shall not affect the enforceability of the remaining provisions of this Agreement, and the parties shall substitute for the affected provision an enforceable provision which approximates the intent and economic effect of the affected provision as closely as possible.

The parties have executed this Agreement as of the date written above.

<p>Boone County Schools</p> <p>By: _____</p> <p>Printed Name: _____</p> <p>Title: _____</p>	<p>VonLehman & Company, Inc.</p> <p>By: _____</p> <p>Printed Name: Deirdre Bird</p> <p>Title: Director, HR Consulting Services</p>
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