PERSONNEL COMMITTEE

5:00 p.m., Tuesday, May 8, 2018

The regular meeting of the Personnel Committee was held at 5:00 p.m., Tuesday, May 8, 2018 in the City Hall Conference Room, 1207 Palm Boulevard, Isle of Palms, South Carolina. Attending the meeting were Councilmember Moye and Rice, Chair Ferencz, Administrator Tucker, Assistant Administrator Fragoso and City Clerk Copeland; a quorum was present to conduct business.

1. Chair Ferencz called the meeting to order and acknowledged that the press and public were duly notified of the meeting in accordance with the Freedom of Information Act.

2. Approval of Previous Meeting's Minutes

MOTION: Councilmember Rice moved to approve the minutes of the regular meeting of April 5, 2018 and the Special Meeting of March 26, 2018 as submitted; Councilmember Moye seconded and the motion PASSED UNANIMOUSLY.

3. Citizens' Comments – None

4. Old Business

A. Review City Code, Chapter 3, sections 1-3-31 through 1-3-36
Develop timeline for revisions to City Code as it pertains to:
1. All standing committees – name, responsibilities and meetings
2. The nomination and voting process for standing committees

B. Consideration of changing the frequency of performance reviews

At the April Personnel Committee meeting, the decision was made to defer Items A and B until August 2018. The Committee chose to delete these items from the Agenda until August.

C. Review of FY19 budget

Chair Ferencz stated that she had called Treasurer Suggs to find out if anything specific should be considered by the Personnel Committee relative to the FY18 budget, and the only budget item dedicated to the Personnel Committee was the allocation for the fees charged by a search firm selected by the City. The "blue budget" only has twenty-four thousand dollars ($24,000), and based on her research to-date, HR Officer DeGroot was certain that the amount currently in the FY19 budget was too low for the services the City wanted done for two (2) positions. She stated that other costs not included would be for travel, advertising, etc.

Councilmember Rice said that she did not want to go to Council more than once for funds for this purpose and supported asking for an allocation of sixty thousand dollars ($60,000).

The range of costs from the search firms were as follows:

	3 positions	2 positions
The Novak Group		$38,500
The Mercer Group	$39,000	
Gov HR	60,500	
Colin Baenziger & Assoc.	74,500	
Strategic Gov Resources	75,000	

In conversation with Director Pitts, he wanted the search firm to source candidates, but he wanted all resumes to come to him and to Human Resources.

Councilmember Moye commented that the quotes in the higher ranges were for three (3) positions; therefore, he was comfortable with putting sixty thousand dollars ($60,000) in the FY19 budget.

HR Officer DeGroot indicated that she was leaning more toward seventy-five thousand dollars ($75,000) to cover the additional expenses like flying more than one (1) person to Charleston for an interview, advertising and the creation of the brochure about the City and the position, etc.

MOTION: Councilmember Rice moved to increase the funds in the FY19 budget to $75,000 to cover a search firm and all expenses related to hiring for the positions of City Administrator and Chief of Police; Councilmember Moye seconded and the motion PASSED UNANIMOUSLY.

5. New Business

A. Discussion of recruitment process for hiring the City Administrator, Chief of Police and Assistant Public Works Director for Facilities and Maintenance

1. Methods of keeping citizens informed of progress
2. Engagement of appropriate standing committees
3. Timeline

B. Report from Human Resources Officer related to recruitment services

Chair Ferencz said that she wanted to be as transparent and inclusive as possible in the search process by including as many Councilmembers via standing committees and to have them involved in the first aspect of hiring the search firm. She would like for the Committee to delve into the firms who have submitted quotes and to agree on its top two (2) choices to present to the Ways and Means Committee along with a cost analysis at the June meeting. Her goal will be for the Ways and Means Committee to vote on the firm it wants the City to hire to conduct the searches. A step that has already been taken was to speak with the chairs of the Public Safety and Public Works Committees to assist the Personnel Committee by reviewing the job descriptions and to compile a profile of the perfect candidate; the Personnel Committee will do the same for the City Administrator.

In addition, Chair Ferencz explained that she would like to form an interview committee composed of the Personnel Committee, a member of the community selected based on the criteria of a job description, and someone in North or South Carolina who currently holds the position of City Administrator and Police Chief to give an objective perspective on the candidates.

Once the three (3) top candidates have been selected for each position, Meet-and-Greets would be scheduled for each position.

Chair Ferencz said that the Personnel Committee would make its recommendation to City Council for the best candidate to fill each position.

To keep the citizens informed, the Chair wants to have space on the City's website detailing the progress that is being made month by month.

HR Officer DeGroot explained that, frequently, when a promotion occurs within a Police Department, a law enforcement officer from another local government is brought in to be part of their process. She added that she thought a sitting Chief would be quite beneficial and valuable because he/she will know the questions to ask that the Personnel Committee would not know.

A draft of a timeline for all of the steps in the process has been developed by Chair Ferencz and is attached to the historical record of the meeting, but she acknowledged that the search firm might have its own timeline. A goal for June was to sign a contract with a search firm by the end of the month and to have the process underway. Additionally in June, the Chair wanted to have revised job descriptions for the open positions.

The HR Officer stated that the search firm was not going to be as interested in the qualifications the City was looking for, but the qualities the City wanted the ideal candidate to have. Equally as important to the search firm will be the qualities about the area, the island and the City; she opined that this would be the bigger task. It will be the Personnel Committee's job to provide the search firm with a lot of information about the Isle of Palms to go into the informational packet they produce for candidates.

When Chair Ferencz stated that she wanted City Council to meet the members of search team, Councilmember Moye said that he did not think that was necessary.

Councilmember Rice opined that the search firm would have their own timeline and that they would drive the process.

Assistant Fragoso reminded the Committee that changes to job descriptions needed the approval of full Council based on a recommendation from the Personnel Committee.

Councilmember Rice expressed amazement with the aggressive timelines the various firms submitted.

Administrator Tucker commented that this was how these firms operated, and the steps outlined in Chair Ferencz' timeline better mirrored the City's handling the search process alone. She opined on the sense of relief the Committee would feel once the search firm was hired and that the best thing the Committee could do was to get them on board as quickly as possible.

Councilmember Rice agreed that the City was hiring someone to do the work and that the Committee needed to let go of some of the work they have discussed.

HR Office DeGroot said that the Committee might get two (2) more proposal by the end of the week.

When Chair Ferencz asked if the Committee thought it necessary to interview the search firms before making a recommendation to Council, Ms. DeGroot said that more than one (1) of the firms she spoke with offered to do a Skype interview. Most of the firms she spoke with were very flexible to do whatever the City needed.

6. Miscellaneous Business

Next Meeting Date: 5:00 p.m., Thursday, June 7th in the Conference Room

7. Executive Session – not needed

8. Adjournment

MOTION: Councilmember Moye moved to adjourn the meeting at 6:10 p.m.; Councilmember Rice seconded and the motion PASSED UNANIMOUSLY.

Respectfully submitted:

Marie Copeland
City Clerk

City of Isle of Palms

Executive Search Firm Services

May 7, 2018

Primary Contact:
Catherine Tuck Parrish
Executive Search Practice Leader
(240) 832-1778
ctuckparrish@thenovakconsultinggroup.com

May 7, 2018

Mayor Jimmy Carroll
City of Isle of Palms
1207 Palm Boulevard
P.O. Box 508
Isle of Palms, SC 29451

Dear Mr. Carroll:

The mission of The Novak Consulting Group is to strengthen organizations, for those they serve and those who work in them. We are dedicated to providing management consulting services to local governments and nonprofit organizations across the country. The firm was originally established as Public Management Partners in 2001, a firm specializing in local government consulting and executive search services in the Midwest. Since then, we have been providing our clients across the country with the best thinking and execution in executive search and management consulting.

We are pleased to submit this proposal for Executive Search Firm Services for the City of Isle of Palms. Our project team for the City comprises skilled professionals, seasoned in local government management with search experience across the country. Our team has had significant success working with organizations to identify and retain ideal candidates who meet each organization's unique set of needs and expectations. We are confident our approach will result in successful leaders for the City. We have conducted recent searches that helped elected officials select key staff after long-serving staff have retired or resigned. We are currently working with a Town with a brand-new council and assisting them in the hire of two key positions: Town Manager and Treasurer.

Our firm has the necessary staff, expertise, resources, and abilities to conduct this recruitment and provide exceptional service to the City. We are a national, women-owned firm, with employees who have served as leaders in some of the best local governments across the country. Our clients receive personal service from our consultants. Our mission is to strengthen communities, and we do this by helping them find the best leaders to help move their organizations forward.

Please contact Catherine Tuck Parrish, our executive search practice leader, at (240) 832-1778 or ctuckparrish@thenovakconsultinggroup.com should you have any questions.

Sincerely,

Julia D. Novak
President

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Introduction to The Novak Consulting Group

For nearly a decade, a highly-respected management consulting firm named Public Management Partners helped a variety of organizations function more effectively. Through the years, the firm's founding partners built a sizeable client base of predominantly local governments and nonprofit organizations in the Midwest.

In 2009, Julia D. Novak acquired Public Management Partners and founded The Novak Consulting Group, staffed by consultants with decades of collective experience. With The Novak Consulting Group, Julia built upon Public Management Partners' reputation for innovation and results while expanding the company's services nationwide. Her company meets a wider range of needs, consulting with governments in the areas of public works, public safety, human resources, finance, planning, IT, and more. We provide our clients with the best thinking and execution in organizational design, development, and improvement. Our services include:

- Strategic Planning
- Organizational Assessment
- Executive Search

The Novak Consulting Group provides unparalleled service to our clients. Leaders in local governments and nonprofit communities have come to rely on The Novak Consulting Group for high caliber advice with the personal attention you expect.

- **Niche expertise.** Our expertise lies in strengthening two kinds of organizations: local governments and nonprofits. We're consulting specialists rather than generalists, focusing our strengths to do a highly effective job for a specific group of clients.
- **Flexibility to serve you better.** We employ a small core staff of senior-level consultants and draw from our pool of subject matter experts when their expertise can help us serve you better. The result? A highly nimble, more efficient approach to giving you the services you need when you need them.
- **Decades of collective experience.** Our associates and subject matter experts have decades of experience in strengthening local municipalities and nonprofit organizations. They've served in a wide range of positions, from city manager to public works director to director of management information systems.
- **Personal service from senior-level consultants.** You appreciate it when deadlines are met, phone calls are returned, and your challenges are given in-depth, out-of-the-box thinking. While a large firm may assign your business to junior-level people, we offer exceptional service from senior-level consultants.

The Novak Consulting Group is staffed with local government professionals, including seven full-time associates and six subject matter specialists. The firm is headquartered in Cincinnati, Ohio, with staff also in Washington, D.C., North Carolina, New Hampshire, Wisconsin, and California. We are a women-owned firm led by President Julia Novak.

Catherine Tuck Parrish is authorized to make representation for and to bind the firm. Her contact information is on the cover page and she is located in the mid-Atlantic (Washington, DC metro area).

Executive Search Strategy

The City of Isle of Palms is seeking the assistance of an executive search firm for the recruitment of a City Administrator and Police Chief.

When organizations need to fill key positions, they turn to The Novak Consulting Group and benefit from this guiding principle: meaningful hiring involves finding the right employee and preparing them for ongoing success. The Novak Consulting Group's approach to our executive search services comprises three key phases.

1. Inquiring, Understanding, and Defining

Each of our clients has a unique culture and set of objectives. Because selecting the right individual is critical to success, we begin our relationship by conducting a needs assessment to identify the specific benchmarks the search must accomplish. We will identify qualifications and requirements, as well as map out the new hire's first-year goals, so both our client and the employee remain on the same track for success. We will build an accurate position profile, thus ensuring we attract the right people for the position.

2. Candidate Search and Evaluation

To reach the right candidates, The Novak Consulting Group customizes each search process to fit the client's needs. Often, the professionals who best fit an open position are already employed and not searching for a traditional job posting. So, we leverage our extensive, diverse professional network to attract the best talent nationwide. We have been successful in identifying a candidate pool that is racially, ethnically, and gender diverse. We advertise in national publications that target minorities and women, including the National Forum of Black Public Administrators (NFBPA) and the International Hispanic Network (IHN). In our recruitments, highly qualified women and minorities earn placement, with 37% of our searches resulting in female hires and 25% of our searches resulting in minority hires. We also work to identify qualified veterans and qualified candidates with disabilities. Once the right candidates are found, we help manage the hiring process from interviews to background checks. Our in-depth service empowers clients to achieve their goals at every step.

3. Supporting Success

We support the top candidate's long-term success by creating a goals-driven work plan actionable from day one. Many firms focus solely on finding qualified applicants, leaving the client on their own once the position is filled. Our team, however, uses the objectives gathered during the inquiry stage to prepare new hires for their first year. We follow up to ensure continued progress, productivity, and satisfaction for the employee and our client.

We take a tailored, goals-based approach to each recruitment. By looking beyond the hiring process, our holistic view ensures that each candidate will fit the role, as well as the organization. In the end, we are not just looking for a successful professional; we are finding the right employee to be successful in their new position long after they are hired.

Our executive recruitment and management consulting experiences have afforded us the opportunity to work with public and nonprofit organizations across the country and provided us with a wide national network. Through our connections, we can identify a broad diversity of qualified candidates in terms of race and ethnicity, gender, jurisdiction size, complexity of

organization, and region of the country. We are proud of our ability to help cities find well qualified candidates who reflect the community that they serve.

Experience

Included in this proposal is a list of all our executive recruitment clients. The following table lists a few comparable recruitments we have recently conducted and references for each of them.

Jurisdiction	Contact Information
Milford, Delaware • City Manager (2016)	Bryan Shupe, Mayor 201 S. Walnut Street Milford, DE 19963 (302) 422-1111 ext. 1300 mayor@milford-de.gov
Aberdeen, Maryland • Director of Privatization (2012) • Police Chief (2011) • Public Works Director (2014)	Doug Miller, Former Aberdeen City Manager and current Ocean City, Maryland City Manager 301 N. Baltimore Avenue Ocean City, MD 21842 (410) 289-8887 dmiller@oceancitymd.gov
Boulder, Colorado • Human Resources Director (2017)	Jane Brautigam, City Manager 1777 Broadway Boulder, CO 80302 (303) 441-3090 brautigamj@bouldercolorado.gov
Harrisonburg, Virginia • City Manager (2017) • Police Chief (current search)	Chris Brown, City Attorney 409 South Main Street Harrisonburg, VA 22801 (540) 432-7701 Chris.Brown@harrisonburgva.gov
Keene, New Hampshire • City Manager (2017)	Elizabeth A. Fox, Assistant City Manager/Human Resources Director 3 Washington Street Keene, NH 03431 (603) 357-9858 efox@ci.keene.nh.us
Kent County, Delaware • County Engineer/Public Works Director (2014)	Michael Petit de Mange, County Administrator 555 S. Bay Road Dover, DE 19901 (302) 744-2305 admin@co.kent.de.us

Lewes, Delaware • Municipal Planning and Development Officer (2016)	Theodore W. Becker, Mayor P.O. Box 227 Lewes, DE 19958 (302) 645-8726 tbecker@ci.lewes.de.us
Loudoun County, Virginia • Assistant County Administrator (2015) • County Attorney (2014) • Director of Animal Services (2015) • Director of Economic Development (2013) • Director of Family Services (2016) • Director of Mapping and Geographic Information • Director of Parks, Recreation and Community Services (2014) • Director of Planning and Zoning (2014) • Finance Director (2016) • Mental Health, Substance Abuse, and Developmental Services Director (2015) • Systemwide Fire Chief (current search)	Tim Hemstreet, County Administrator Tim.hemstreet@loudoun.gov John Sandy, Assistant County Administrator John.sandy@loudoun.gov Charles Yudd, Deputy County Administrator Charles.yudd@loudoun.gov 1 Harrison Street, S.E. P.O. Box 7000 Leesburg, VA 20175 (703) 777-0200
Louisville, Colorado • City Manager (2017) • Planning and Building Safety Director (2016)	Kathleen Hix, Human Resources Director 749 Main Street Louisville, CO 80027 (303) 335-4720 KathleenH@Louisvilleco.gov
Mansfield, Connecticut • Town Manager (2017)	Paul Shapiro, Mayor 4 South Eagleville Road Mansfield, CT 06268 (860) 429-3336 ShapiroPM@mansfieldct.org
Rehoboth Beach, Delaware • City Manager (2014)	Patrick Gossett, Commissioner 229 Rehoboth Avenue Rehoboth Beach, DE 19971 (302) 227-6181 pgossett@cityofrehoboth.com
Rockville, Maryland • City Manager (2016) • Community Planning and Development Services Director (current search)	Bridget Donnell Newton, Mayor 111 Maryland Avenue Rockville, MD 20850 (240) 314-8291 bnewton@rockvillemd.gov
Windsor, Connecticut • Police Chief (2015)	Peter Souza, Town Manager 275 Broad Street Windsor, CT 06095 (860) 285-1800 townmanager@townofwindsorct.com

Recruitment Team

Executive Search Practice Leader Catherine Tuck Parrish has more than 25 years of experience serving local governments, in direct service or as a consultant. Catherine leads our search practice and has conducted over 100 searches for city manager/administrator; police chief; directors of public works, finance, human resources, planning, economic development, and human services; and many other key positions in local governments across the country. Catherine was the deputy city manager in Rockville, Maryland where she oversaw parks and recreation, human resources, information technology, finance, neighborhood resources (citizen engagement), communications, customer service, and intergovernmental functions. She is also familiar with large organizations, having worked in the County Executive's Office in Fairfax County, Virginia on a variety of projects, including county-wide human resources projects.

Catherine will be assisted by Associate Jenn Reichelt. Jenn joined The Novak Consulting Group in 2016 following 16 years of direct service to local governments in Arizona and Montana. Jenn brings extensive experience in the areas of human resources management, collective bargaining, mediation, and arbitration processes. Jenn has a strong background in community engagement, public outreach, and media relations. Throughout her career, Jenn has coordinated the development of successful citizen outreach and communication plans for departments as well as larger community-wide initiatives.

Their complete resumes follow.

Catherine Tuck Parrish, Executive Search Practice Leader

Catherine has over 25 years of management experience working for local governments of all sizes, nonprofit organizations, and associations. She leads The Novak Consulting Group's executive search practice. She has conducted over 100 searches for city manager/ administrator; police chief; directors of public works, finance, human resources, planning, economic development, and human services; and many other key positions in local governments across the country.

In addition to executive recruitment, she has facilitated numerous governing body workshops, staff retreats, and strategic planning sessions. Her work as a consultant includes project management and contributions to numerous local government projects.

EDUCATION

- Master of Public Administration, University of Kansas
- Bachelor of Arts, University of Kansas

INDUSTRY TENURE

- 27 years
- Consulting, 8 years
- Local Government, 19 years

Catherine's most recent local government experience was as deputy city manager in Rockville, Maryland where she oversaw parks and recreation, human resources, information technology, finance, neighborhood resources (citizen engagement), communications, customer service, and intergovernmental functions. She also served as acting city manager in Rockville for nearly a year. Prior to joining the City of Rockville, Catherine served as assistant to the county executive in Fairfax County, Virginia working on change management issues including a new pay system, employee surveys, implementation plans, and internal communication improvements. Catherine also served as ethics advisor at the International City/County Management Association (ICMA), counseling elected officials and citizen groups regarding employment agreements, form of government issues, and recruitment. Additionally, she worked for the cities of Denton and University Park, Texas.

She chaired the ICMA's Acting Manager Task Force, which produced a handbook for interim managers. She also led the Maryland City/County Management Association (MCCMA) as president and vice president. She served as president, vice president, and secretary of the Metropolitan Association of Local Government Assistants in the Washington, D.C. metro area. Catherine has spoken at national and state conferences on a variety of topics, including civility, effective councils, ethics, forms of government, human resource topics, long-term financial planning, budget strategies, developing high performing organizations, and leadership. She has also spoken at the National League of Cities' Leadership Training Institute on recruiting and evaluating the CEO. She is a certified instructor of the Myers-Briggs Type Indicator instrument.

She has a bachelor's degree in personnel administration and communication studies from the University of Kansas and a master's degree in public administration from the University of Kansas. She is an active member of ICMA and the MCCMA.

Jenn Reichelt, Associate

Jenn Reichelt has 16 years of experience in local government management, most recently as deputy city manager for the City of Great Falls, Montana. Prior to her time in Montana, she worked for the City of Glendale, Arizona for 10 years.

Jenn joined The Novak Consultant Group in June 2016 and brings with her a wealth of knowledge in the areas of human resources management and labor management. She is adept in collective bargaining, mediation, fact-finding, and arbitration processes. Jenn has a strong background in community engagement, public outreach, and media relations, as well as crisis and emergency management. She is skilled at working with diverse stakeholders and building consensus.

EDUCATION

- Master of Public Administration, Northern Arizona University
- Bachelor of Science, Northern Arizona University

INDUSTRY TENURE

- 17 years
- Consulting, 1 year
- Local Government, 16 years

Throughout her career, Jenn has coordinated the development of successful citizen outreach and communication plans for departments as well as larger community-wide initiatives. Some of the larger projects she has worked on include the 2010 Census, a capital improvement bond election, a public safety sales tax election, and construction and transportation projects.

During her tenure in Great Falls, Jenn oversaw all human resources and personnel activities which included working with the City's 10 labor unions. She coordinated the city's communication efforts and served as the city's primary public information officer. Jenn improved customer service, internal operations, and increased revenue opportunities at the Great Falls Animal Shelter and Mansfield Performing Arts Center. In addition, she managed the city's five Tax Increment Financing Districts (TIF) and assisted applicants in receiving more than $11 million in TIF funding.

In Glendale, Jenn served as the deputy marketing & communications director. She led the city's downtown redevelopment efforts and assisted in the development of Glendale's Sports & Entertainment District. She oversaw the city's tourism efforts which included the creation of a Convention & Visitors Bureau and the city's advertising, sports marketing, and branding campaigns. Jenn served as a city spokesperson and assisted in mega-event planning for events such as the 2008 Super Bowl, WrestleMania XXVI, Fiesta Bowls, and Cactus League Spring Training games for the Los Angeles Dodgers and Chicago White Sox.

Jenn earned a bachelor's degree in business administration and a master's degree in public administration from Northern Arizona University. She is a member of the International City/County Management Association (ICMA) and a graduate of Leadership ICMA and the Weldon Cooper Center for Public Service Senior Executive Institute.

Work Plan

The following provides a detailed description of our work plan for recruitment services for City Administrator and Police Chief for the City of Isle of Palms.

Activity 1 – Develop Candidate Profile

The Novak Consulting Group will begin this engagement by developing a clear picture of the ideal candidate for City Administrator and Police Chief by speaking with each member of the City Council. It is important to recognize the individual expectations of each elected official, in addition to learning the shared goals for a new City Administrator and for the next Police Chief. We will solicit meaningful feedback from key City staff. We will discuss not just the technical skills needed for the position, but what makes for the right organizational fit in terms of traits and experiences. We will use this input to develop the profile and first-year goals.

We will also work with the Council to identity at what points and how to engage the community. This could include an online survey, focus groups or a public meeting to hear what residents and businesses are looking for in the next City Administrator and Police Chief.

Based on the information learned from our meetings, we will develop a tailored marketing and recruitment plan that includes South Carolina and coastal communities in the southeast and mid-Atlantic as well as other targeted areas. We will prepare a position profile that is unique to Isle of Palms for each position. The profile will identify the organization's needs, the strategic challenges of each position, and the personal and professional characteristics of the ideal candidate. This document drives the recruitment. It focuses our efforts on the most capable candidates, and it helps us persuade candidates to pursue the position.

We will also develop first-year organizational goals for the successful candidate for each position. These goals will ensure that the applicants know what will be expected of them should they be hired, the City has thought about what they want the person to accomplish in the first year, and the successful candidate can hit the ground running with a work plan as soon as he or she starts. Once drafted, we will review the recruitment plan, position profile, and first-year goals with the Mayor and Council. Modifications will be made as necessary before recruitment begins.

Activity 2 – Conduct Active Recruitment and Screening

As part of the recruitment plan, we will identify individuals and jurisdictions to target directly through social media, phone, and email contacts. We have found that this combination is an effective way to reach top applicants, especially those who are not currently in the job market but may be willing to consider a move to an excellent organization like the City of Isle of Palms. The Novak Consulting Group will prepare and place advertisements. These will be placed in state and national publications, online sites, and social media to attract candidates from throughout the United States. While this will be a national search, we will target our efforts to those key areas identified in the recruitment plan.

As soon as the profile and advertisements are completed, we will begin the process of actively and aggressively marketing the position and identifying qualified candidates for assessment. The process will identify networks and organizations, such as the International City/County Management Association (ICMA), International Association of Chiefs of Police (IACP), Municipal Association of South Carolina, South Carolina City and County Management Association, South

Carolina Police Chiefs Association as well other state police chief and City/County manager associations in the southeast and mid-Atlantic as identified in the recruitment plan. We will target other coastal communities as well. We will seek candidates who are minorities, women, and those who have worked in similar communities. We will also ask the City for names of individuals who might make outstanding candidates for the position.

We will acknowledge each application as it is received and keep prospective applicants aware of the status of the process.

The Novak Consulting Group will assess applicants for each position against the position profile and first-year goals. We will conduct a prescreening of applicants via phone or Skype with those who most closely meet the profile to learn more about their interest, qualifications, and experience for this position. We will provide the Council with candidate materials, internet research, and additional information about the top candidates for each position. We will then meet with the Mayor and Council in a candidate review meeting and help the elected body select those it wants to interview for City Administrator and Police Chief.

Activity 3 – Support Interviews and Selection

Each person you wish to interview will then be contacted again by The Novak Consulting Group. We will plan and facilitate a customized, multi-step interview process specific for each position. The process could include writing and role play exercises and/or a community reception. A book that contains interview questions and information about each of the candidates invited to interview will be provided to those involved in the interview process for each position. We will also facilitate pre- and post-interview briefings.

We will work with the City to arrange travel logistics for each candidate. Expenses for the candidates will be borne by the City.

The selection of the top candidate is for the City. The Novak Consulting Group can help make a well-informed choice by framing what we have learned about the candidates in the context of the position and its requirements. We will speak with candidates' references to confirm the strength of their credentials. We will also review published information found in search engines, online publications, and social media. Reference and background checks will be performed on the top candidates including but not limited to education credentials, employment history, criminal background check, civil litigation check, and credit check.

The Novak Consulting Group can also assist in negotiating the employment offer. We will provide information about best practices in compensation and we will have obtained the candidate's salary history.

At the close of the search, all applicants will be notified of the results. Those who helped you in the process will be thanked for their contribution to a successful effort. Additionally, The Novak Consulting Group will contact the successful candidate during his or her first year on the job to discuss their progress toward implementation of the goals that were established for this position at the beginning of the process.

Cost for Services

The total fixed fee to complete the City Administrator and Police Chief recruitment as outlined in this proposal is $38,500. This includes all professional fees and expenses for The Novak Consulting Group.

We estimate the following additional costs to the City which would be direct billed at cost.

- Approximately $1,000-$1,500 for advertising
- Background checks for the top finalists estimated at $175-$300/finalist
- Travel for finalists' interviews will also be borne by the City.

If the City desires, we can assist in developing recruitment materials for other positions as an addition to this agreement.

It is our practice to invoice clients monthly based on services provided.

Accepted for the City of Isle of Palms:		Accepted for The Novak Consulting Group
Name, Title:	_____	Julia D. Novak, President
Signature:	_____	_____
Date:	_____	May 7, 2018

The Novak Consulting Group

strengthening organizations from the inside out

Our mission is to strengthen organizations, for those they serve and those who work in them. We are local government professionals, and we provide services tailored to local governments:

- *Facilitation & Strategic Planning*
- *Executive Search*
- *Organizational Assessment & Optimization*

See how we can help you solve your organization's challenges.
Visit TheNovakConsultingGroup.com or call 513-221-0500 today.

leadership expertise. exceptional service.

The Novak Consulting Group

We offer our clients innovative thinking that strengthens organizations from the inside out. Our management consulting services combine the personal attention and flexibility of a small firm with the sophistication and senior-level expertise of a large firm.

Facilitation & Strategic Planning

Leading planning sessions for successful outcomes.

Managing group processes is equal parts art and skill. We've facilitated countless group exercises including staff retreats and goal setting conversations with governing bodies. We excel at navigating complex interpersonal dynamics within an organization to ensure its employees are aligned to carry out its vision.

Executive Search

Finding and developing strong leaders.

The quality of an organization's leaders is critical to its health and long-term success. Executive search can be an invaluable service for both elected bodies hiring executive staff and CEOs filling high-level positions. Executive coaching develops leaders within an organization, not only enhancing their performance, but helping it retain talent throughout its ranks

Organizational Assessment & Optimization

Maximizing efficiency and productivity.

Assessing and optimizing organizational performance is one of our core services. We evaluate operations at every level, from a single department to the organization as a whole.

513-221-0500
1776 Mentor Ave
Cincinnati, Ohio 45212

thenovakconsultinggroup.com

The Novak Consulting Group

Executive Search Process

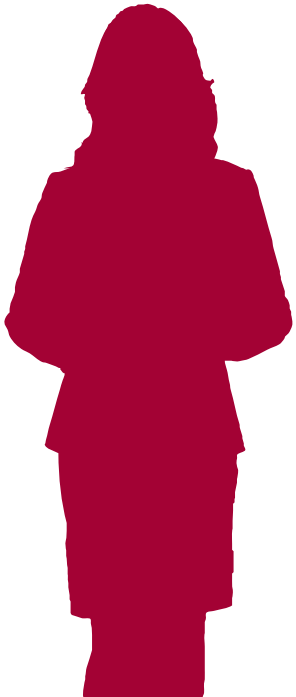
1 develop candidate profile

- Discuss needed skills and organizational culture
- Develop recruitment plan and position profile
- Develop 12-month goals

2 conduct aggressive recruitment

- Identify target individuals and jurisdictions
- Prepare and place advertisements
- Leverage networks
- Identify qualified candidates for assessment

3 support selection



- Screen each applicant
- Prepare candidate summaries
- Develop interview process
- Finalize candidate list
- Facilitate interview and selection

successful candidate

executive search solutions

When you peel away the processes, products and services, what makes an institution last? Meaningful goals built off strong ideals — supported by ***the right people.***

But goals and ideals are easily derailed if new employees aren't properly prepared for success. Because in the end, finding great employees is one thing, but making the most of their abilities is another entirely.

At The Novak Consulting Group, we apply a holistic approach to Executive Search that focuses on long-term performance rather than short-term placement. ***Not only will we support your organization by finding the right people when you need them most — our diligent work and ongoing guidance will ensure their contributions are significant from day one.***

Learn how your organization can benefit from a focused, forward-thinking Executive Search. Visit TheNovakConsultingGroup.com or call 513-221-0500 today.

The Novak Consulting Group

a better executive search process

The Novak Consulting Group

1 ASSESS NEEDS

gather information from key players to identify specific performance goals for the position

2 FIND THE RIGHT CANDIDATES

identify, assess and recruit the best person to accomplish goals

3 DEVELOP PLAN FOR SUCCESS

create work model for goals to be met in the first six to twelve months

In the end, we aren't just looking for a successful professional, we are finding the right employee to be successful in their new position long after they're hired.

FILLING KEY POSITIONS, SUCH AS:

- *City and County Manager*
- *General Manager*
- *Chief Executive Officer*
- *Chief Administrative Officer*
- *Executive Director*
- *Assistant/Deputy Manager*
- *Department Head*
- *Key Staff Members*
- *Technical Staff*

IN AREAS THAT INCLUDE:

- *Executive Leadership*
- *Finance and Administration*
- *Information Technology*
- *Human Resources*
- *Communication and Public Relations*
- *Human and Social Services*
- *Public Works*
- *Police, Fire and Public Safety*
- *Planning and Community Development*
- *Program Managers*
- *and others*

When governing bodies and nonprofit organizations need to fill key positions, they turn to The Novak Consulting Group and benefit from this guiding principle: meaningful hiring involves finding the right employee and preparing them for ongoing success.

Selection and Retention Process

1 ***INQUIRING, UNDERSTANDING & DEFINING*** Each of our clients has a unique culture and set of objectives. Because selecting the right individual is critical to success, we begin our relationship by conducting a needs assessment to identify the specific benchmarks the search must accomplish. We'll identify qualifications and requirements, as well as map out the new hire's six to twelve month goals, so both our client and the employee remain on the same track for success. We'll build an accurate position profile, thus ensuring we attract the right people to the position.

2 ***CANDIDATE SEARCH & EVALUATION*** To reach the right candidates, The Novak Consulting Group customizes each search process to fit the client's needs. Often, the professionals who best fit an open position are already employed and not searching for a traditional job posting. So, we leverage our extensive, diverse professional network to attract the best talent nationwide. Once the right candidates are found, we help manage the hiring process from interviews to background checks. Our in-depth service empowers clients to achieve their goals at every step.

3 ***SUPPORTING SUCCESS*** We support the top candidate's long-term success by creating a goals-driven work plan actionable from day one. Many firms focus solely on finding qualified applicants, leaving the client on their own once the position is filled. Our team, however, uses the objectives gathered during the inquiry stage to prepare new hires for their first year. Six to eight weeks after their placement, we follow up and conduct a job review to ensure continued progress, productivity and satisfaction for the employee and our client.

The Novak Consulting Group Difference

Our consultants not only have experience in Executive Search, they've also had prior careers in many of the fields where we search for candidates. This combined expertise allows our team to deliver the best and brightest prospects through a goals-based approach. By looking beyond the hiring process, we take a holistic view that ensures each candidate will fit the role, as well as the organization. In the end, we aren't just looking for a successful professional, we are finding the right employee to be successful in their new position long after they're hired.

who we work for

executive search

The Novak Consulting Group

State	Jurisdiction	Position
Arizona	Peoria	Human Resources Director
Colorado	Boulder	Human Resources Director
	Louisville	City Manager
		Director of Planning and Building Safety
	Loveland	Budget Manager*
		Economic Development Director*
Connecticut	Greenwich	Town Administrator
	Mansfield	Town Manager
	Meriden	City Manager
	Windsor	Police Chief
Delaware	Kent County	County Engineer/Public Works Director
	Lewes	Municipal Planning and Development Officer
	Milford	City Manager
	Milton	Town Manager
	Rehoboth Beach	City Manager
Illinois	Peoria County	Director, Animal Protection Services
Kansas	Baldwin City	City Administrative Officer
	Edgerton	Building Inspector
		Community Devexlopment Director
	Tonganoxie	City Manager
Maryland	Aberdeen	Director of APG Privatization
		Public Works Director
		Police Chief
	Berwyn Heights	Code Supervisor
		Town Administrator
	Cambridge	City Manager
	Charles County	Director of Community Services*
	Gaithersburg	Finance Director
		Public Works Director
	Garrett Park	Town Manager

State	Jurisdiction	Position
Maryland	La Plata	Planning Director
		Police Chief
		Town Manager
		Town Treasurer
	Mount Rainier	City Manager
	New Carrollton	City Administrative Officer
	Riverdale Park	Town Manager
	Rockville	City Manager
		Community Planning and Development Services Director
	Sykesville	Town Manager
Michigan	Novi	Assistant City Manager
		Finance Director
	Rochester Hills	Chief Financial Officer
Missouri	Chesterfield	City Administrator
	Lee's Summit	Human Resources Director
New Hampshire	Keene	City Manager
New York	Batavia	City Manager
	Oneonta	City Manager
Ohio	Centerville	City Manager
	Cleveland Heights	City Manager
		Finance Director
	Dublin	City Manager
		Director of Public Service
	Granville	Village Manager
	Hudson	City Manager
	Miami Township	Township Administrator
	Moraine	City Manager
	Oberlin	Fire Chief
		Police Chief
	Portsmouth	City Manager
	Sandusky	City Manager

** candidate sourcing/screening*

who we work for

executive search

The Novak Consulting Group

State	Jurisdiction	Position
Ohio	Union County	County Administrator
	Upper Arlington	Assistant City Manager*
	Washington Township	Township Administrator
	West Chester Township	Township Administrator
	Westerville	Deputy Director of Planning and Development
		Finance Director
	Worthington	Assistant Fire Chief
Oregon	Lane County	Public Works Director
Pennsylvania	Carlisle Borough	Police Chief
	Exeter Township	Assistant Township Manager
Texas	Lancaster	Assistant City Manager
		Finance Director
	University Park	City Engineer
		Human Resources Director
Virginia	Alexandria	Controller
	Arlington County	Central Library Services Division Chief*
	Ashland	Town Manager
	Fairfax County	County Executive
	Harrisonburg	City Manager
		Police Chief
	Loudoun County	Animal Services Director
		Assistant County Administrator
		County Attorney
		Economic Development Director
		Family Services Director
		Finance Director
		Fire Chief
		Mapping and Geographic Information Director
		Mental Health, Substance Abuse, and Developmental Services Director

State	Jurisdiction	Position
Virginia	Loudoun County	Parks, Recreation, and Community Services Director
		Planning and Zoning Director
Washington	Shoreline	Administrative Services Director
		City Manager
Wisconsin	Mequon	City Administrator

Organizations & Associations	Position
Central Brown County Water Authority, Wisconsin	Manager
Ocean Pines Association, MD	General Manager
Orleans Parish School Board	Chief Operations Officer
Solid Waste Authority of Central Ohio (SWACO)	Director of Administration

United Methodist Church	Position
Discipleship Ministries	General Secretary
Florida United Methodist Children's Home	President and CEO
Florida United Methodist Foundation	President
General Board of Higher Education and Ministry	Associate General Secretary/ Division of Ordained Ministry
	General Secretary
Global Ministries	Deputy General Secretary Mission and Evangelism
	Director of Communications
Impact Church	Executive Director
United Methodist Committee on Relief	Deputy General Secretary
United Methodist Frontier Foundation	President and Executive Director
Western Pennsylvania Annual Conference	Treasurer

** candidate sourcing/screening*

The Novak Consulting Group

who we work for

who we work for

Project Key
OA: Organizational Assessment and Optimization
ES: Executive Search
SPF: Strategic Planning and Facilitation

State	Jurisdiction	Project type		
Arizona	Peoria		ES	
	Sierra Vista			SPF
California	Gilroy	OA		
	Hayward			SPF
	Long Beach Transit Authority	OA		
	Manhattan Beach			SPF
	Palo Alto			SPF
	Placer County			SPF
	San Luis Obispo			SPF
	San Marino			SPF
	Yountville			SPF
Colorado	Adams County			SPF
	Aurora	OA		SPF
	Boulder	OA	ES	SPF
	Brighton			SPF
	Centennial			SPF
	Fort Collins	OA		SPF
	Greeley	OA		
	La Plata County	OA		
	Louisville		ES	
	Loveland		ES	
	Routt County			SPF
	Westminster			SPF
	Windsor	OA		SPF
Connecticut	Enfield	OA		
	Greenwich		ES	
	Groton	OA		
	Manchester	OA		SPF
	Mansfield	OA	ES	
	Meriden		ES	
	Windsor		ES	
Delaware	Kent County		ES	
	Lewes		ES	
	Milford		ES	
	Milton		ES	
	Rehoboth Beach		ES	
Florida	Palmetto Bay			SPF
Georgia	Decatur			SPF
	Roswell			SPF
Illinois	Carbondale	OA		
	DuPage County	OA		
	Evanston	OA		
	Geneva			SPF
	Gurnee			SPF
	Lisle			SPF
	Peoria County		ES	
	Schaumburg	OA		
	Warrenville	OA		
	Woodridge			SPF
Indiana	Indianapolis	OA		
	Munster	OA		SPF
Kansas	Baldwin City		ES	SPF
	Bonner Springs	OA		
	Edgerton		ES	
	Edwardsville			SPF
	Eudora			SPF
	Garden City	OA		
	Gardner			SPF
	Lawrence			SPF
	Olathe			SPF
	Roeland Park			SPF
	Shawnee	OA		SPF
	Tonganoxie		ES	SPF
	Unified Gov't of KCK			SPF
Kentucky	Lexington-Fayette Urban County Government	OA		
	Paducah			SPF
Louisiana	New Orleans	OA		
Maryland	Aberdeen	OA	ES	SPF
	Berwyn Heights		ES	
	Cambridge		ES	
	Charles County		ES	
	College Park			SPF
	Gaithersburg		ES	
	Garrett Park		ES	
	Greenbelt			SPF
	La Plata		ES	
	Maryland State Judiciary			SPF
	Mount Rainier	OA	ES	
	New Carrollton		ES	

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State	Jurisdiction	Project type		
Maryland	Ocean City			SPF
	Riverdale Park		ES	
	Rockville	OA	ES	SPF
	Sykesville		ES	
	University Park			SPF
	Westminster			SPF
Massachusetts	Franklin County	OA		
	Pioneer Valley Planning Commission	OA		
	Westborough			SPF
Michigan	Ada			SPF
	Ann Arbor			SPF
	Ferndale			SPF
	Holland	OA		
	Midland			SPF
	Novi		ES	
	Rochester Hills	OA	ES	
Minnesota	Edina	OA		
Missouri	Chesterfield		ES	
	Clayton			SPF
	Lee's Summit	OA	ES	
	Maryville			SPF
	North Kansas City			SPF
	Parkville			SPF
	Platte City	OA		
	Sikeston			SPF
	St. Louis County			SPF
	University City			SPF
Nebraska	Hastings	OA		
Nevada	Reno	OA		
New Hampshire	Keene		ES	
New York	Edgemont	OA		
	Ithaca	OA		
	Oneonta		ES	
	Rochester	OA		
New Jersey	New Jersey Health Initiative	OA		
North Carolina	Albemarle			SPF
	Asheville	OA		
	Brevard			SPF
	Cary			SPF
	Greensboro	OA		
	Raleigh	OA		SPF
	Swansboro			SPF

State	Jurisdiction	Project type		
North Carolina	Wake County	OA		
	Wilmington	OA		
Ohio	Beavercreek Township	OA		
	Blendon Township			SPF
	Blue Ash	OA		SPF
	Centerville		ES	
	Cincinnati	OA		SPF
	Clearcreek Township	OA		SPF
	Cleveland Heights	OA	ES	SPF
	Delaware	OA		
	Delaware County			SPF
	Delaware County EMS			SPF
	Dublin	OA	ES	SPF
	Gahanna	OA		SPF
	Granville		ES	
	Hudson		ES	
	Miami Township		ES	
	Moraine		ES	
	Oberlin	OA	ES	SPF
	Portsmouth		ES	
	Powell			SPF
	Sandusky		ES	
	Sharonville			SPF
	Toledo			SPF
	Troy	OA		
	Union County		ES	
	Upper Arlington		ES	SPF
	Washington Township	OA	ES	SPF
	West Chester Township		ES	
	Westerville		ES	
	Worthington	OA	ES	SPF
Oklahoma	Norman	OA		
Oregon	Gresham			SPF
	Hillsboro			SPF
	Lane County		ES	
	Salem			SPF
	Wilsonville	OA		SPF
Pennsylvania	Carlisle Borough		ES	
	Duquesne	OA		
	East Buffalo	OA		
	East Whiteland Township	OA		
	Exeter Township	OA	ES	
	Farrell	OA		

(over, please)

State	Jurisdiction	Project type		
Pennsylvania	Ford City Borough	OA		
	Harrisburg	OA		
	Hazleton	OA		
	Lancaster County	OA		
	Lewisburg	OA		
	Nanticoke	OA		
	Reading	OA		
	St. Marys	OA		
Rhode Island	Westerly	OA		
South Carolina	Charleston	OA		
Tennessee	Farragut			SPF
Texas	Allen			SPF
	Cedar Hill			SPF
	Dallas			SPF
	Lancaster		ES	SPF
	League City			SPF
	Pearland	OA		
	Prosper			SPF
	University Park		ES	SPF
	The Woodlands	OA		SPF
Utah	Murray			SPF
	South Jordan			SPF
Virginia	Alexandria		ES	
	Arlington County		ES	
	Ashland		ES	
	Charlottesville	OA		
	Fairfax County		ES	
	Fredericksburg	OA		
	Hampton			SPF
	Harrisonburg		ES	
	Loudoun County	OA	ES	
	Vienna			SPF
	Warrenton	OA		
Washington	Bellevue	OA		SPF
	Mercer Island			SPF
	Sequim	OA		SPF
	Shoreline	OA	ES	
West Virginia	Morgantown			SPF
Wisconsin	Mequon		ES	
	Oak Creek			SPF
	Washington County			SPF

Organizations & Associations	Project Type		
Alliance for Innovation			SPF
Ann Arbor Transportation Authority, Michigan			SPF
Central Brown County Water Authority, Wisconsin		ES	
Connecticut Town and City Management Assoc.	OA		
GoTriangle Transit, Durham, NC	OA		SPF
International City/County Management Assoc.	OA		SPF
Maryland Municipal League	OA		
Miami University of Ohio	OA		
Miami Valley Risk Management Authority, Ohio			SPF
Midland Community Foundation, Michigan			SPF
Minnesota Municipal League	OA		
Missouri Municipal League			SPF
National Association of State and Local Equity Funds			SPF
National League of Cities	OA		
Ocean Pines Association, MD		ES	
Ohio City/County Management Association	OA		SPF
Orleans Parish School Board		ES	
Owens-Corning, Ohio			SPF
Solid Waste Authority of Central Ohio (SWACO)	OA	ES	
USAID – Moldova	OA		

United Methodist Church	Project Type		
Baltimore Washington Annual Conference	OA		
California-Nevada Annual Conference	OA		
Connectional Table	OA		
Dakotas Annual Conference	OA		
Discipleship Ministries	OA	ES	SPF
Florida Annual Conference	OA		
Florida United Methodist Children's Home		ES	
Florida United Methodist Foundation	OA	ES	SPF
General Board Of Higher Education And Ministry	OA	ES	
Global Ministries	OA	ES	SPF
Impact Church		ES	
Justice For Our Neighbors			SPF
Louisiana Annual Conference – Wesley Center			SPF
St. John's Church, Louisiana			SPF
United Methodist Committee On Relief	OA	ES	SPF
United Methodist Frontier Foundation		ES	
Western Pennsylvania Annual Conference		ES	

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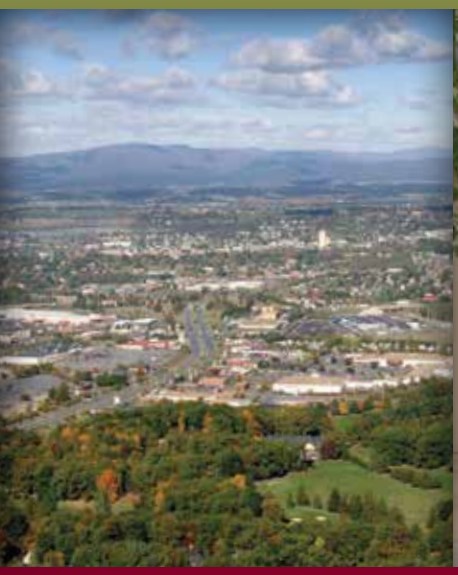

recruitment announcement

Police Chief

Police Chief – Harrisonburg, Virginia

The Position

Harrisonburg's next Police Chief will lead a department with a stellar record and strong community and interfaith relationships in an energetic college town within the central Shenandoah Valley. Harrisonburg, or "The Friendly City," enjoys the presence of two universities, lively neighborhoods, an arts and cultural district, culinary district, and spectacular outdoor recreation spots nearby. The City has a history of an effective government that is fiscally sound, has stability in its leadership, interacts with an engaged citizenry, and provides exceptional services.

The Harrisonburg Police Department (HPD) is made up of 111.5 sworn police officers and 25 full-time civilian support personnel, who provide 24-hour emergency and non-emergency services to a diverse population. There are 21 auxiliary officers (volunteers) of which 13 are sworn and eight are administrative.

The command staff includes three captains who oversee Patrol, Special Operations, and Administrative bureaus and six lieutenants. There are six sergeants, nine corporals, and two civilian supervisors. Patrol operates primarily with 12-hour fixed shifts of day, nights, and a power shift during the evenings.

In the current structure, the Police Chief's direct reports are the three captains, an administrative lieutenant, internal affairs corporal, crime analyst, senior program support specialist, and two chaplains.

The department has an approved 2017-2018 budget of $ 11.9 million. There are currently one civilian and 13 officer vacancies. The HPD works closely with the Rockingham County Sheriff's Office, Public Safety personnel at James Madison University and Eastern Mennonite University, and the Harrisonburg-Rockingham County Emergency Communications Center. The City is a partner in the Rockingham County Jail and Middle River Regional Jail.

The mission of the department is to partner with the community and City departments to reduce crime, provide a safe community, encourage personal responsibility of residents, and continue to enhance the public's trust. As a means of developing community involvement and partnerships, the department utilizes the geographic policing concept also called the Police Service Model. The department is divided into seven geographic districts with officers and supervisors assigned to each district.

The Police Chief reports directly to the City Manager and works closely with the Deputy City Manager and all department directors. The position is open after the retirement of a chief who served the department for five years, who ultimately replaced a chief who served for more than 20 years.

The Organization

The City of Harrisonburg operates under the council-manager form of government. Residents of Harrisonburg elect a five-member council to direct the goals and policies of the City. The five-member council has four-year, staggered terms. The Mayor and Vice Mayor are chosen and voted on by the council itself and serve in their roles for two years. The City Manager is appointed by the Council and oversees the delivery of public services through the city departments. There are 12 departments within the City including Planning and Community Development, Economic Development, Finance, Fire, Emergency Communications Center, Human Resources, Information Technology, Parks and Recreation, Police, Public Transportation, Public Utilities, and Public Works. The Voter Registrar, Commissioner of the Revenue, and Treasurer are elected officials who work with staff on a daily basis.

The City of Harrisonburg manages a workforce of approximately 621 full-time and 128 part-time employees and has an adopted FY2018 general fund budget of $111,679,799.

Applications will be accepted electronically by The Novak Consulting Group at thenovakconsultinggroup.com/jobs and will be kept confidential. Applicants first complete a brief online form and then are prompted to provide one document (Word or PDF) that has a cover letter, resume with salary history, and a list of 3-5 professional references. Open until filled with first review of applications June 8, 2018.

The Novak Consulting Group

Requirements

The position requires a minimum of ten (10) years of experience as a police officer, including at least five (5) years of experience in supervision and management in a command rank or higher. A bachelor's degree in criminal justice, police administration, psychology, or related field is also required.

Preferred qualifications include a master's degree, specialized training such as the FBI National Academy, CLEE (Certified Law Enforcement Executive), or the Administrative Officers Course at the Southern Police Institute of the University of Louisville, and experience in the Commonwealth of Virginia. Other preferred qualifications include a demonstrated commitment to the community, change leadership, extensive knowledge of community-oriented policing techniques, experience working in a college town and in a multi-racial and multi-cultural community, and the ability to attract and retain a well-qualified, diverse workforce. The successful applicant must pass a background investigation, credit check, DMV review, and City-mandated drug and alcohol testing. The position requires possession of a driver's license valid in the Commonwealth of Virginia. Must possess Virginia Department of Criminal Justice Services law enforcement certification within 12 months of hire date or be granted a waiver.

The Ideal Candidate

The ideal candidate will be a progressive police professional, who is community-oriented, engages with employees at all levels, and has had demonstrated success in change leadership. The next Police Chief will demonstrate the highest level of personal and professional integrity, can lead the department in a culturally rich and diverse community, and work effectively to continuously improve police operations, public safety, and department morale.

The next Chief will take the work seriously and have a sense of humor and humility. The candidate will be open and approachable, a clear communicator, and visible in the community and in the department at all levels. The ideal Police Chief will be a strong leader who will be firm, fair, and hold themselves, command staff, and all officers and staff to the highest levels of service and integrity.

The expected hiring range is $115,000 – $125,000 depending on qualifications, with an excellent benefits package.

Questions should be directed to Catherine Tuck Parrish or Jenn Reichelt at the email address at the bottom of the page or 513-221-0500.

(over, please)

APPLY ONLINE:
thenovakconsultinggroup.com/jobs

QUESTIONS?
apply@thenovakconsultinggroup.com

This person will support the department and its employees, will have a high energy and passion for the work, and be committed to achieving results, yet flexible and realistic to motivate others to achieve positive change. He or she will be skilled at utilizing best practices including community-oriented policing, de-escalation, and other techniques to work with those with mental illness, while maintaining a safe environment for police officers and community members.

The ideal candidate will earn the respect of his or her officers, command staff, elected officials, City management, members of the public, and colleagues in the law enforcement community. He or she will be skilled in all areas of police operations, having served as both a patrol officer and a leader and will take a balanced approach to staffing the different components of a law enforcement agency – patrol, investigations, specialty teams, and civilian and volunteer support.

The next Police Chief will inspire both sworn and civilian personnel by establishing a clear vision and by engaging police personnel in developing both short and long-term goals for the department that fall in line with citywide goals. The ideal candidate will combine community policing, effective use of technology, and alternative dispute resolution techniques, and will partner with interfaith and community leaders and other law enforcement organizations, to provide the best services for residents and visitors to the City. He or she will bring innovative approaches to pedestrian safety, traffic, and other quality of life issues impacting public safety.

The next Police Chief will work to improve recruitment and retention of officers, ensure the department provides growth and development for officers, and continue a tradition of strong community partnerships at all levels of the organization. This individual will be fully invested in the City of Harrisonburg, the department, and the community.

The Community

The City of Harrisonburg is an independent city located in the central Shenandoah Valley region of Virginia. The City falls within Rockingham County and encompasses 17.3 square miles, serving a population of approximately 54,000. Harrisonburg is located along Interstate 81 and is only two hours away from both Richmond and Washington, D.C.

Once an agricultural hub, Harrisonburg has now evolved into a lively and distinct destination with a vibrant arts and entertainment scene, is home to a plethora of parks and trails, and hosts community events throughout the year.

Downtown Harrisonburg was designated as Virginia's first recognized Arts and Cultural District in 2001 and the first recognized Culinary District in 2014. Downtown boasts a variety of locally owned restaurants, coffee shops, bars, craft breweries, and boutiques. The area is home to an expansive network of galleries, music venues, theaters, and museums, making it an exciting place for anyone to enjoy.

The City owns the Heritage Oaks Golf Course, voted Best of the Valley 2008, 2009, 2011, 2012, and 2015. Designed by William Love, Heritage Oaks is a challenging, scenic par 70 course that offers a wide variety of holes for golfers of all abilities.

Harrisonburg is a melting pot of ethnic diversity. In recent years, over 1,900 refugees have been settled into the City. Harrisonburg City Public Schools students speak 55 different languages with English, Spanish, Arabic, and Kurdish being the most common.

Within the Harrisonburg City Public School system are five elementary schools, two middle schools, and a high school. Harrisonburg is also home to two university campuses – James Madison University and Eastern Mennonite University. James Madison is a public research university with an enrollment of over 21,000 students and Eastern Mennonite University (EMU) is a private, Mennonite-affiliated liberal arts university with an enrollment of 1,880 students.

Harrisonburg has been a Bronze Level Bicycle Friendly Community since 2011 and is dedicated to adding bicycle and pedestrian facilities throughout the community, making it attractive to walkers, runners, and cyclists alike. Miles of trails and sidewalks make it a walkable and bike-friendly community.

The Novak Consulting Group

recruitment announcement

CITY OF REHOBOTH BEACH DELAWARE

City Manager

position description:

City Manager – Rehoboth Beach, Delaware

Applications accepted electronically at thenovakconsultinggroup.com/jobs and the city's website, www.cityofrehoboth.com, with a cover letter, resume, five year salary history and 3-5 professional references. Deadline – October 4, 2013.

The Novak Consulting Group

The Community

Rehoboth Beach, a picturesque, thriving, welcoming coastal city in Sussex County, Delaware, has a year-round population of 1,327, with summer daytime populations around 20,000. Known as the "Nation's Summer Capital" because of its proximity to, and summertime popularity with, the residents of Washington, DC, Rehoboth Beach is a popular vacation destination for a diverse group of visitors and summer residents from the entire mid-Atlantic, including the metropolitan areas of Baltimore and Philadelphia. Visitors come to relax on the beach, to visit Rehoboth's historic, mile-long wooden boardwalk, to eat in its fantastic restaurants, and to enjoy tax-free shopping. The compact size of the City, one-mile square, makes it a wonderfully pedestrian and bicycle-oriented community for residents and visitors. The City boasts beautiful trees, ample green space, and quiet neighborhoods adjacent to its bustling downtown, boardwalk, and the Atlantic Ocean. The community is a mixture of residential property owners and businesses. Some residents are year-round, and others are present primarily on weekends and during the summer season. Similarly, many businesses operate 12 months of the year, while others are seasonal in operation.

Originally founded as Rehoboth Beach Camp Meeting Association by a Methodist minister in 1873, the City of Rehoboth Beach was formally incorporated in 1891. Rehoboth Beach has grown to become one of the premier vacation destinations on the east coast, with beaches consistently ranked among the best in the country. In 2013 and 2012, Rehoboth Beach was given a five star rating, the highest rating, by the Natural Resources Defense Council, for its commitment to ensuring the health and cleanliness of its beach. Only 13 of the 200 rated beaches received the five star rating. Also in 2013, the Rehoboth Beach Boardwalk was named one of ten "Great Coastal Boardwalks" by Coastal Living magazine, and the city was designated one of "America's Best Little Beach Towns" by Travel and Leisure magazine. And in 2013, Parents Magazine named Rehoboth Beach one of the ten best beach towns for families. In addition to being known as a vacation destination, Rehoboth Beach and its environs in Southern Delaware were named as a top retirement destination by Where To Retire magazine in 2012. Retirees make up a significant proportion of the city's year-round population, with 60% being 55 years old or older in 2010.

Every summer since 1963, the city has sponsored the Rehoboth Beach Bandstand, a free concert series that entertains beachgoers Fridays through Sundays. On Tuesdays, rain or shine, Grove Park off Rehoboth Avenue hosts the Rehoboth Beach Farmer's Market, which draws, over 550 shoppers and 25 vendors each week. On holidays and during special events, Rehoboth Beach's population swells as high as 40,000, plus daytime visitors, especially during the Fourth of July and Sea Witch Halloween celebrations. And every August the Rehoboth Beach Historical Society hosts the Rehoboth Beach Museum Beach Ball and Silent Auction. Median household income in Rehoboth Beach was $77,500 and 36% of residents reported annual income of $100,000 or more in 2011. Housing values have been increasing and 84% of owner-occupied properties were valued at $500,000 or more in 2011. Downtown Rehoboth Beach contains more than 200 boutique shops, galleries and spas; 40 hotels and B&B's; and over 100 gourmet restaurants, casual eateries and spots for sweets and treats. A Main Street program and strong Chamber of Commerce partner with the City on events and services to keep the business community thriving.

The anticipated hiring range is $90,000 to $110,000, depending on qualifications, with a generous benefit package.

The Position

The City Manager serves as the Chief Administrative Officer of the City and is responsible for the oversight and management for all city operations and staff. The City Manager oversees its 81 FTE year-round staff and approximately 175 seasonal staff during the summer. The City FY 2013-14 budget is $15,963,640, including a capital improvement program of $1,274,345.

The City provides police, beach patrol and lifeguards, parking, sanitation, street cleaning and maintenance, water and wastewater, building and licensing, Alderman (municipal) Court, and building and grounds maintenance services to City residents as well as internal service functions such as fleet maintenance, finance, information technology and administration. The City Manager oversees all work done on the City's streets, sidewalks, boardwalk, beaches, jetties, and parks. Fire protection services are provided by the Rehoboth Beach Volunteer Fire Company. The city has 14 City departments with all department heads reporting to the City Manager. In addition to the day-to-day management of the City, the City Manager recommends and advises the Board of Commissioners on all items for adoption and proposes the annual operating and capital budget. The City Manager is responsible for advising the Board of Commissioners of the City's financial condition and oversees labor relations and human resources.

Deadline: October 4, 2013.

(over, please)

Apply online at www.thenovakconsultinggroup.com/jobs

bringing solutions into focus.

The Novak Consulting Group

The Position (continued)

The City of Rehoboth Beach operates under the council-manager form of government with a Mayor and a six-member City Commission, elected for three-year, staggered terms. The City Manager is retiring after 32 years of service to the City. The City Manager reports directly to the Board of Commissioners.

Requirements include a Bachelor's degree in public administration or related field and 7-10 years of local government experience with at least five years in progressively responsible management / supervisory positions. Experience in a seasonal/tourist community, human resources expertise, strong financial skills, a Master's degree, and ICMA-Credentialed Manager certification are preferred.

The Ideal Candidate

The ideal City Manager will take time to listen and learn the flow of operations in this seasonal city. He/she will exhibit the community's values of tolerance, preservation of Rehoboth Beach's unique character, and a balance of resident, visitor, and business interests. The City Manager will bring fresh ideas, a systemic view of local government operations, and a long-term vision that will help the City prepare for continued excellence in the future. He/she will have a strong work ethic and have a proven track record of local government management, the ability to motivate others, and practical problem-solving skills. The ideal candidate will be articulate, patient, strong, and engender trust through his/her own personal integrity. He/she will be organized to tackle a variety of projects, provide analysis which is both fiscally and environmentally responsible, and bring both interpersonal and technical savvy.

Questions should be directed to Catherine Tuck Parrish at 240-832-1778 or by email at apply@thenovakconsultinggroup.com

The Mercer Group, Inc.

CITY OF ISLE OF PALMS, SOUTH CAROLINA

Executive Search Services

CITY ADMINISTRATOR, CHIEF OF POLICE, PUBLIC WORKS ASSISTANT DIRECTOR

May 4, 2018

The Mercer Group, Inc.

Why Should the Isle of Palms Select The Mercer Group, Inc.

Qualifications and Staffing

The Mercer Group, Inc. has been in operation for over thirty five years with our corporate headquarters in Atlanta and offices in thirteen (13) States. We have successfully recruited over 2,000 public sector executives nation-wide, many of which have been in the city administrator, chief of police and public works fields.

The project manager for Isle of Palms recruitments set out above will be James L. Mercer, President/CEO and he will serve Isle of Palms from our Santa Fe, New Mexico, location. Mr. Mercer has over 35 years of public sector management experience throughout the country. Learn more about Mr. Mercer by visiting http://www.mercergroupinc.com/about-us Mr. Mercer will be assisted on this project by Mr. Clark Wurzberger, Senior Vice President, and Ms. Karolyn Prince-Mercer, Senior Vice President.

Understanding the Project

Services provided include, but are not limited to position analysis and preparation of position profiles, recruitment for the position, inviting potential candidates to apply, reviewing and screening applications, conducting interviews, reference checks and background checks of selected candidates, recommending a list of final candidates, coordinating "meet and greet functions" and final interviews, negotiating, and following up.

Our Approach and Our 7-Step Search Process

We recommend a seven (7)-step search process, including:

1. **Position Analysis** – We will define work relationships, job qualifications and requirements for the position – the "Position Profile".
2. **Recruitment Process** – We will recruit state-wide, regionally and nationally for the position and network to locate qualified candidates.
3. **Resume Review** – We will identify qualified candidates.
4. **Candidate Screening** – Will be handled personally and thoroughly by Mr. Mercer.
5. **Background Investigation** – We will thoroughly evaluate prospective candidates.
6. **Interview Process** – We will make recommendations and assist in selection.
7. **Negotiation and Follow-up** – We will facilitate employment and follow-up to ensure complete integrity of the process.

The details of our 7-Step Search Process are defined in our formal proposal.

The Mercer Group, Inc.

Why Should the Isle of Palms Select The Mercer Group, Inc.

Qualifications and Staffing

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The details of our 7-Step Search Process are defined in our formal proposal.

THE MERCER GROUP, INC.

James L. Mercer, President/CEO
1000 Cordova Place #726
Santa Fe, New Mexico 87505
505-466-9500
505-660-7725
jmercer@mercergroupinc.com
www.mercergroupinc.com

ISLE OF PALMS, SOUTH CAROLINA

Proposal for Executive
Search Services for
the Positions of

CITY ADMINISTRATOR, CHIEF OF POLICE, PUBLIC WORKS ASSISTANT DIRECTOR

May 4, 2018

The Mercer Group, Inc.

Consultants To Management

The Mercer Group, Inc.

Consultants To Management

1000 Cordova Place, #726
Santa Fe, New Mexico 87505
505-466-9500
FAX 505-466-1274
E-mail: jmercer@mercergroupinc.com

May 4, 2018

VIA E-MAIL: wynetted@iop.net
Honorable Jimmy Carroll, Mayor
Ms. Sandy Ferencz, Chair of Personnel
City of Isle of Palms
1207 Palm Boulevard
Isle of Palms, SC 29451

Dear Mayor Carroll and Ms. Sandy Ferencz:

The Mercer Group, Inc. is most pleased to submit this proposal to assist the Isle of Palms to recruit nationally and to develop exceptionally well-qualified candidates for the positions of City Administrator, Chief of Police and Public Works Director Assistant. We are most interested in assisting the Isle of Palms with these critical projects, and if selected to conduct the searches, would have no difficulty beginning the searches immediately and expediting our work to ensure a smooth process. The Mercer Group, Inc. has extensive experience in conducting searches in theses fields locally and nationally. We are especially well qualified to conduct this search for the Isle of Palms.

The purpose for engaging the services of an executive search firm is to seek out and recruit experienced candidates and to assist the Isle of Palms in selecting highly qualified individuals who meet the profile and needs of the Isle of Palms and who might not otherwise apply. We have conducted recent searches in these fields for several communities your size. We are quite familiar with the candidate pool and the local needs.

We are the largest nationwide public sector search firm and we have more experience than any other public sector executive search firm. Mr. Mercer is a Certified Management Consultant (CMC) which is the preeminent designation earned in the management consulting profession. It is an indication that the individual possessing it has met and continues to meet strict certification requirements of the Institute of Management Consultants. The CMC designation represents that the individual has met world-class standards of competence, ethics and independence in the management consulting field. Mr. Mercer is the only management consultant with this designation operating in the public sector. (Please see www.mercergroupinc.com for more information about our firm and about current searches that we are conducting.)

The mission of The Mercer Group, Inc. is to make our clients proud that they engaged us to provide management consulting services for them. The Mercer Group, Inc. also makes extensive use of the Internet both with our own web page which can be located at www.mercergroupinc.com and through e-mail. We post positions with other Internet providers and make information available to a wide number of people who are Internet users. We also make extensive use of the Internet to review newspaper articles on top candidates, etc., from the community in which they are currently employed or were employed in the past.

Our corporate headquarters is in Atlanta and we have branch offices in Arizona, California, Colorado, Florida, Georgia, Illinois, Louisiana, Michigan, Minnesota, New Mexico, North Carolina, Texas, Virginia and Washington. We will work on the assignment from our Santa Fe office.

Lead consultant on this search will be James L. Mercer. Other consultants to be used on this search will be Clark Wurzberger and Karolyn Prince-Mercer.

Thank you for the opportunity to respond to this important assignment. This proposal is valid for ninety (90) days from receipt by the Isle of Palms. We are looking forward to discussing this proposal with you personally, and urge you to allow us to come to the City of Isle of Palms at our expense to do that. We can move very quickly to do so. Please call me at 505-466-9500 if you have any questions.

Sincerely yours,

THE MERCER GROUP, INC.

James L. Mercer, President/CEO
Certified Management Consultant (CMC)

Enclosure

ISLE OF PALMS, SOUTH CAROLINA

Proposal for

Executive Search Services

for the Positions of

CITY ADMINISTRATOR, CHIEF OF POLICE, PUBLIC WORKS DIRECTOR ASSISTANT

May 4, 2018

JAMES L. MERCER, PRESIDENT/CEO
THE MERCER GROUP, INC.
5579B Chamblee Dunwoody Road
Suite 511
Atlanta, Georgia 30338
770-551-0403
770-399-9749 FAX
jmercer@mercergroupinc.com
www.mercergroupinc.com

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I. INTRODUCTION, BACKGROUND, OBJECTIVES AND SCOPE

This section presents our understanding of the Isle of Palms's requirements for this search, as well as the objectives and scope of the project.

A. Introduction and Background

It is our understanding that:

- The Isle of Palms is seeking "turn-key" executive search services and support in connection with the recruitment of a new City Administrator, Chief of Police, Public Works Director Assistant (the positions).
- The Isle of Palms is interested in identifying outstanding candidates and filling the above positions.
- Services required include position analysis and preparation of position profiles, recruitment for the position; inviting potential candidates to apply; reviewing and screening applications; conducting interviews, reference checks and background checks of selected candidates; recommending a list of final candidates; coordinating final interviews; negotiating; and following up.
- The Isle of Palms wishes to conduct a comprehensive national recruitment process, to ensure the best qualified candidates are found and that the best qualified individuals who are acceptable can be hired.
- The annual salary and benefits package for the position will be discussed with the Mayor and Chair of Personnel.

B. Objectives

The objectives that we will meet in order to help find the best qualified candidates for the position are as follows:

- To conduct on-site needs assessment for the positions.
- To develop comprehensive position profiles for each position.
- To reconcile any differences in points of view with regard to specifications for the positions.
- To encourage top level people to apply who would otherwise be reluctant to respond to an advertisement.
- To save a considerable amount of the Mayor's and Chair of Personnel's time in establishing position profiles and reviewing applicants.
- To comply with appropriate personnel regulations and state laws (i.e., EEO, Affirmative Action and ADA).
- To independently and objectively assess the qualifications and suitability of candidates for the positions.
- To recommend a pool of finalist candidates to the Mayor and Chair of Personnel.
- To coordinate finalist candidate interviews with the Mayor and Chair of Personnel .
- To mail an information packet supplied by the Mayor and Chair of Personnel to all qualified applicants.
- To respond to all candidate inquiries and produce all correspondence throughout the search.
- To preserve the confidentiality of inquiries to the degree possible under South Carolina law.
- To assist the Mayor and Chair of Personnel in reaching a final decisions.

- To assist in negotiating a compensation package with the successful candidates on behalf of the Mayor and Chair of Personnel .
- To assist the Mayor and Chair of Personnel in establishing criteria for evaluating the performance of the successful candidates.
- To follow-up with the Mayor and Chair of Personnel and the new successful candidates during the first year to determine if adjustments need to be made.
- To keep the Mayor and Chair of Personnel closely involved in key decisions and informed of our progress.

C. Scope

The scope of the project will be sufficiently broad and in-depth so as to meet the requirements of the Isle of Palms. However, for the fees proposed it will not address recruitments of additional candidates for positions other than the ones specified.

II. OUR APPROACH, WORK PLAN AND SCHEDULE

This section presents our approach, work plan and schedule for the search project.

A. Approach

Our approach and style are interactive. That is, we form a partnership with our client to conduct a project. The Isle of Palms will benefit through ease of implementation and by gaining more in-depth knowledge of executive search and management consulting techniques and expertise.

B. Work Plan

We recommend a seven (7)-step search process for each position as follows:

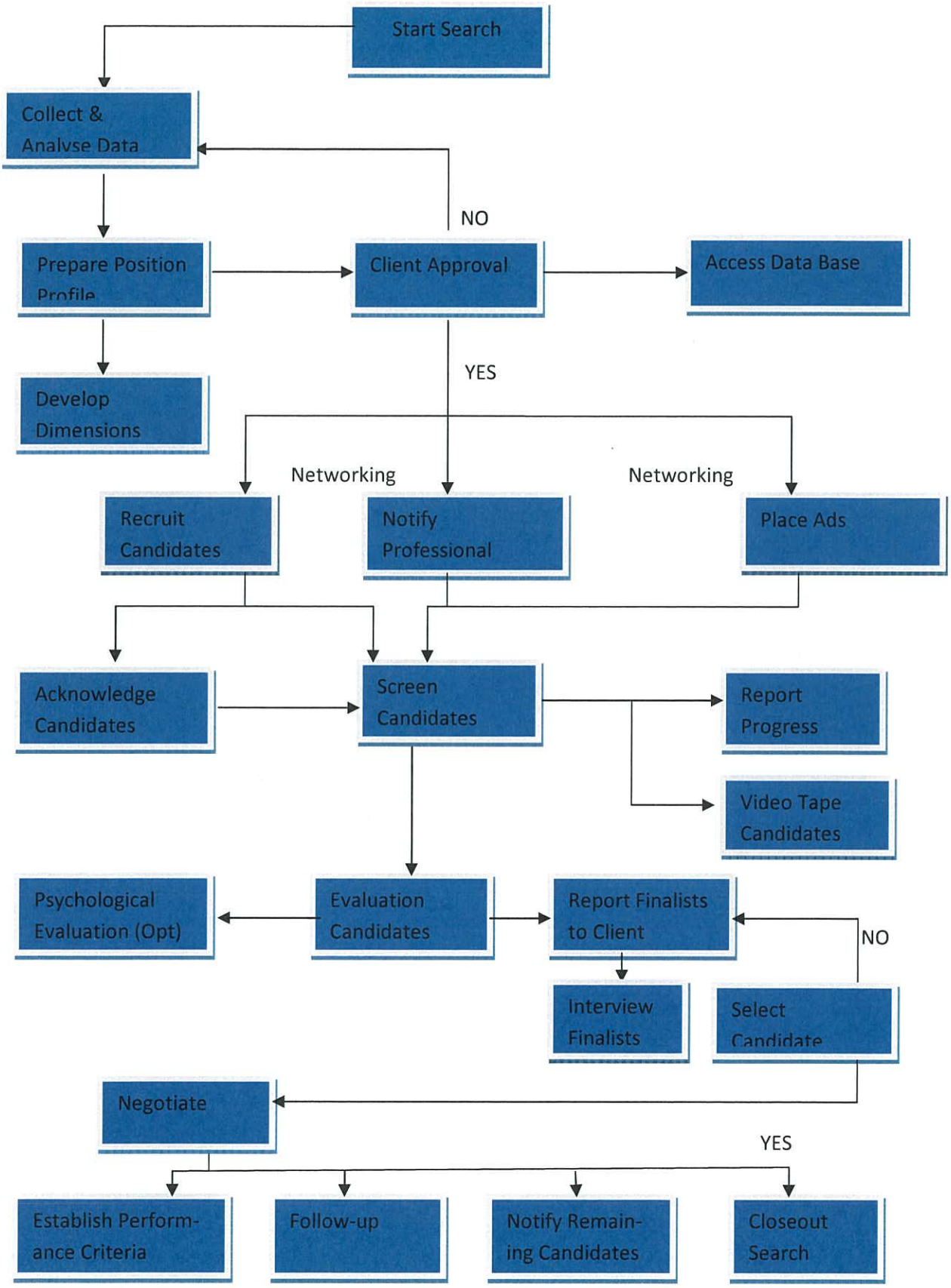
- **Position Analysis** — We will define work relationships, job qualifications and requirements for the position — the "Position Profile".
- **Recruitment Process** — We will recruit regionally and nationally for the position and network to locate qualified candidates.
- **Resume Review** — We will identify qualified candidates.
- **Candidate Screening** — We will thoroughly screen prospective candidates.
- **Background Investigation** — We will thoroughly evaluate prospective candidates.
- **Interview Process** — We will make recommendations and assist in selection.
- **Negotiation and Follow-up** — We will facilitate employment and follow-up to ensure complete integrity of the process.

The Search Process is illustrated on the following page and each step is described below.

1. Position Analysis

We will have extensive consultation with the Mayor and Chair of Personnel and local leaders selected by them, as well as other individuals or groups (if you wish) to determine the City's vision/mission, goals and objectives, the needs and issues, requirements of the job, and to obtain

THE MERCER GROUP, INC.
Executive Search Process



information about the environment within which the position functions. In addition, we will spend a considerable amount of time at the beginning of the process in the Isle of Palms in order to determine the level of experience and training needed.

During this process, we will initiate individual interviews with the Mayor and Chair of Personnel , citizen organizations, department heads and key staff, and others of your choice to identify expectations, perceptions, and concerns regarding the position.

Based on those meetings, we will prepare a draft position profile and review it with the Mayor and Chair of Personnel in order to arrive at a general agreement regarding the specifications for the position. The final position profile will include information about the Isle of Palms, the community, major issues to be faced, the position, and the selection criteria established.

2. Recruitment Process

Because we have recently completed similar searches, we will first review our database to determine those candidates whom we may already know and/or already have on file who may meet the City's specifications.

Although this process is valuable, we will rely most heavily on our own contacts in the city administrator, chief of police and public works director field and on our own experience. In other words, through "networking", we will conduct a nation-wide professional search for the best qualified candidates and invite them to apply for the position.

We will provide the Mayor and Chair of Personnel with several advertising alternatives with varying degrees of cost and their associated benefits. Based on our discussions with the Mayor and Chair of Personnel, we will place ads in professional journals, in national, in-state and local newspapers, and in various minority and women's publications to encourage applicants to apply.

3. Resume Review

We will review and analyze each applicant's background and experience against the position description criteria. We will acknowledge all resumes received and keep candidates informed of their status.

4. Candidate Screening

Criteria for the preliminary screening will be contained in the approved "Recruitment Profile". They may include such items as education, technical knowledge, experience, accomplishments, management style, personal traits, etc. Screening of candidates against those criteria will be based on data contained in the resumes and other data provided by the candidates and on our knowledge of the organizations in which they work. At this stage, each must meet the minimum qualifications specified in the Recruitment Profile.

We will be responsible for screening the applications received. This initial screening will be conducted by telephone and/or interactive video with the prospective candidate. We will conduct interviews with references who may know the candidate's background and expertise by telephone. Where feasible, we will also conduct personal interviews with top candidates.

Once the initial screening is completed, we will select the prospective candidates who most closely match the criteria established by the Mayor and Chair of Personnel. The output of this step in the process will be a matrix display of the top candidates showing how each rates against the selection criteria established by the Mayor and Chair of Personnel. This matrix will be reviewed with the Mayor and Chair of Personnel in meetings and guidance obtained prior to proceeding. One contingency here is that the Mayor and Chair of Personnel may not approve of any of the candidates. If that should occur, we would, of course, keep searching until the Isle of Palms's needs are clearly met. A Sample Matrix is on the following page.

After review by the Mayor and Chair of Personnel, we will personally interview each using various interview techniques. We will closely examine their experience, qualifications and achievements in view of the selection criteria and our professional expertise in evaluating the quality of such qualifications and achievements.

We also request that all candidates provide us, in writing, substantial information about their accomplishments and their management style and philosophy. This information will be verified and, at the Mayor's and Chair of Personnel's option, may be further tested by having the finalists complete management and leadership style inventories. We interpret these instruments for the Mayor and Chair of Personnel, as well.

5. Background Investigations

As part of our process in evaluating top candidates, we make detailed and extensive reference checks. In conducting these, it is our practice to speak directly to individuals who are now or have previously been in a position to evaluate the candidates' job performance.

We ask each candidate to provide us with a large number of references. We then network these references to other persons who know the candidate. In this way, we thoroughly evaluate each candidate. We have talked to as many as 23 references concerning a single finalist candidate. These references and evaluations are combined to provide frank and objective appraisals of the top candidates. We also verify past employment difficulties, if any, including reasonable due diligence on any legal action filed against current or former employers.

As part of our evaluation process, we verify undergraduate and graduate college degrees. We arrange for credit checks, criminal checks, and, as an additional option, can arrange for psychological (or similar) testing of the candidates that may be desired. As a part of this project we can provide the results of a Teleometrics Management Style Inventory on the finalist candidates. We can also conduct a Myers-Briggs analysis of the team with the new team member for team building purposes. (These may be extra cost items.) We will recommend background investigation criteria to the Mayor and Chair of Personnel which will make the final decision on the specifics of the background check.

6. Interview Process

Based on the preceding steps, a recommended list of finalists for the positions will be compiled. We will prepare a written summary on each finalist. The information will cover, but not be limited to, 1) present position, 2) total years experience, 3) salary requirements, 4) education, 5) previous positions held, 6) notable projects, 7) management style, 8) skills and abilities, 9) inter-

THE MERCER GROUP, INC.
SAMPLE CANDIDATE EVALUATION MATRIX

A = Significant Experience
B = Some Experience
C - No Working Knowledge

Selection Evaluation Criteria

CANDIDATE	Economic Development	Participative Management	Program Budget	Communications Skills
John Jones	A	A	A	A
Mary Jackson	C	B	B	A
Juan Perez	B	A	C	A
Joe Washington	A	B	C	B
Susan Jones	A	C	C	C
William Jefferson	C	B	B	A
Linda Chong	B	C	B	B
Jenny Olson	B	A	B	B
Michelle Walinski	A	C	B	A

ests, and 10) professional goals.

This information will be presented to the Mayor and Chair of Personnel in a detailed written format combined with the results of the background investigation and candidate screening. We will make a recommendation on a group of five (5) to seven (7) finalists. The Mayor and Chair of Personnel shall make the final decision on which and how many candidates will be interviewed.

Our report will be presented in a meeting with the Mayor and Chair of Personnel in which we will discuss our recommendations and provide background information, sample questions and a rating form for the interviews. We can also assist the Mayor and Chair of Personnel at no extra charge in conducting targeted selection and/or simulation processes with finalists, if desired. In particular, we will explain which, if any, of the applicants specifically meet the total criteria established by the Mayor and Chair of Personnel or whether the final group simply represents the best available talent.

We will also provide the Mayor and Chair of Personnel with our recommendations relative to timing, sequencing, location, setting, format, and conduct of interviews with the finalists. We will provide information about trends in employment, employment contracts and agreements, relocation expenses, perquisites, appropriate role for spouses, receptions, etc. We will arrange schedules for top candidate interviews with the Mayor and Chair of Personnel and will coordinate the process.

7. Negotiation and Follow-up

We will also assist in the negotiation process relative to salary, benefits and other conditions of employment. We feel that we can be especially helpful because we have proposed a fixed fee rather than one based on a percentage of salary. One contingency here is that an agreement may not be able to be arranged. If that is the case, we will work with the Mayor and Chair of Personnel to select an alternate candidate.

We will properly handle any and all media relations. Unless otherwise directed, it is our standard practice to tell all media that we are working on behalf of the Mayor and Chair of Personnel and that any public statement should come directly from the County Administrator. We will maintain confidentiality of candidate information, to the degree possible, under South Carolina law.

Finally, we will notify by letter all unsuccessful candidates who were not recommended for interview with the Mayor and Chair of Personnel of the final decision reached. We suggest, however, that it is more proper for the Mayor and Chair of Personnel to directly notify all unsuccessful candidates whom they interviewed of the final result.

Once the new candidates have been on board for 30 days or so, we will conduct a session with the Mayor and Chair of Personnel and with the new candidates in order to establish mutual performance criteria and goals for the position. In this regard, we will work with the Mayor and Chair of Personnel to define the role of the new Public Works Director within The Isle of Palms.

We will follow-up periodically with the Mayor and Chair of Personnel and the new personnel

during the first year in order to make any adjustments that may be necessary.

We will keep the Mayor and Chair of Personnel closely informed and involved in decisions concerning the search process at all times. We will prepare and send to the Mayor and Chair of Personnel weekly e-mail updates and a formal progress report at the mid-point of the search. These reports will contain a progress report on the recruitment and specific steps to be taken to meet the Mayor's and Chair of Personnel's deadlines and an itemization of expenses incurred-to-date and expected to be incurred during each succeeding project step.

Support from the Mayor and Chair of Personnel will be needed, as follows:

Arranging interviews with the Mayor and Chair of Personnel and key City staff
Providing budget, organization charts and other documents
Place of contact for the search
Processing invoices for payment

C. Schedule

The search process normally takes 90- 120 days to complete. On the next page is a sample Timeline. This schedule could be condensed or expanded somewhat, depending on the needs of the Isle of Palms.

D. Equal Employment Opportunity Statement

It is the policy of The Mercer Group, Inc., to assure equal opportunity based on ability and fitness for all employees or applicants considered for our client organizations regardless of race, color, religion, sex, age, marital or veteran's status, national origin, or the presence of any sensory, mental or physical disability. Such policy shall apply, but not be limited to, hiring, placement, job classification, transfer or promotion, demotion, recruitment, advertising or solicitation for employment, rates of pay or other forms of compensation, selection for training, career development, layoff or termination.

This policy shall be disseminated to clients, subcontractors, suppliers and prospective applicants. The intent of this policy will apply to internal operations, recruitment and consulting activities conducted by our firm.

III. COST PROPOSAL

Our fee for the services outlined is $39,000 to conduct all three recruitments (this includes expenses). If the Isle of Palms would like to have the City Administrator and Chief of Police search done together the total cost for those 2 searches together would be $33,500. To conduct the Public Works Assistant Director search separately will be $10,000 total.

Because of our other ongoing consulting and search work and our experience, expenses should be kept to a minimum. The cost for final candidates to travel to interview with the Mayor and Chair of Personnel is not included. Such costs are typically paid by the client on a reimbursement basis,

CITY OF ISLE OF PALMS
CITY ADMINISTRATOR, CHIEF OF POLICE AND PUBLIC WORKS ASSSISTANT DIRECTOR SEARCH
PROJECTED TIMELINE

RECRUITMENT PROCESS	
Proposal Due	May 3, 2018
Kickoff Meeting and Interviews with City Officials and Others to be Interviewed Regarding **Desired Qualities** for new Positions	May 15-16, 2018
Draft Recruitment Brochure to City Officials Commission for **Review and Approval**	May 22, 2018
Color Recruitment Brochure to City Officials for **Review and Approval**	May 25, 2018
Access Data Base, Place Ads and Kick Off Search Process	May 22, 2018
Send Recruitment Brochure/Invitation Letter	May 25- 28, 2018
Follow-up Telephone Calls	May 25-July 6, 2018
Cutoff Date for Receipt of Applications	July 6, 2018
Review with City Officials **Short List** of Candidates	July11, 2018
Conduct Reference and Background Checks	July 12-26, 2018
Send **Interview Guide to Commission** on Top 5 Candidates	July 31, 2018
Commission Conducts Interviews on Top 5 Candidates	August 6-7, 2018
Make Selection	August 7, 2018
Negotiate Agreement and Hire	August 7-10, 2018
Selected Candidate On-Board	30/60 days later
Close off Search Process	Week of August 12, 2018

directly to the candidates. These costs are extremely difficult to estimate because they depend on where the candidates are located. Typically, out-of-state costs run about $750 to $1,000 per person.

The Isle of Palms's liability to The Mercer Group, Inc. for services rendered under this agreement will not exceed the agreed upon price unless an increase is authorized by the Mayor and Chair of Personnel in writing.

We will submit regular invoices for fees and expenses. It is our practice to bill one-third at the start of the search, one-third upon delivery of the semi-finalist application materials, and one-third upon delivery of the Final Report. Each invoice is due and payable upon receipt for professional services. Expenses will be billed in addition and shown as a separate figure.

We will comply with all applicable laws, rules and regulations of federal, state and local government entities.

Our ability to carry out the work required will be heavily dependent upon our past experience in providing similar services to others, and we expect to continue such work in the future. We will, to the degree possible, preserve the confidential nature of any information received from you or developed during the work in accordance with our professional standards.

We assure you that we will devote our best efforts to carrying out the engagement. The results obtained, our recommendations and any written material provided by us will represent our best judgment based on the information available to us. Our liability, if any, will not be greater than the amount paid to us for the services rendered.

This proposal constitutes the agreement between us. It cannot be modified except in writing by both parties. Our agreement will be interpreted according to the laws of the State of South Carolina.

IV. FIRM QUALIFICATIONS AND STAFFING

This section presents our qualifications to conduct projects of this type and describes the staff to be assigned to the search.

A. Firm Qualifications

The Mercer Group, Inc. is an independent management consulting firm incorporated in the State of Georgia and operating nation-wide. The firm was founded by James L. Mercer, a long-term public management consultant.

The Mercer Group, Inc. provides exceptionally high quality management consulting services to state and local governments, transit authorities, health care providers, utilities, special districts, and private sector clients. Specialty practice areas include: executive recruitment, organization and operations analysis, productivity improvement, strategic planning, management systems, compensation/classification/policy studies, privatization, budget evaluation services, government consolidation and organization development, training, and general management consulting. Our key consultants have conducted successful searches for hundreds of public sector organizations nationally and can offer numerous references as testimony of our work.

This important engagement will be conducted by Mr. James L. Mercer. Mr. Mercer has conducted or assisted in the conduct of more than 2000 successful executive searches in recent years. Mr. Mercer's resume is included below.

B. Resumes of Our Key Staff

1. James L. Mercer, President - Atlanta and Santa Fe Offices

Mr. Mercer holds a Master of Business Administration degree from the University of Nevada, Reno, and a Bachelor of Science degree in Industrial Management from the same institution. He has also received a Certificate in Municipal Administration from the University of North Carolina at Chapel Hill and is a graduate of the Executive Development Program at Cornell University. Mr. Mercer is a Certified Management Consultant (CMC) and has more than 25 years of experience in executive search and management consulting. He has authored or co-authored five books and has written more than 250 articles on various management topics. His experience covers the following functional areas: executive search, organization and operations analysis, management systems, productivity improvement, seminars/training, goal setting, strategic planning, privatization, government, consolidation, and general consulting.

Prior to founding The Mercer Group, Inc., Mr. Mercer held positions as President of Mercer, Slavin & Nevins, Inc.; Regional Vice President of Wolfe & Associates, Inc.; as Partner and Vice President of Korn/Ferry International; General Manager of Battelle Southern Operations; National Program Director for Public Technology, Inc.; and Assistant City Manager of Raleigh, North Carolina. He has also been President of James Mercer & Associates, Inc., and has served as Director of Government Consulting Services for Coopers & Lybrand in both the Southeast and Southwest, as well as Director of the Industrial Extension Division for Georgia Tech.

2. Clark Wurzberger, Senior Vice President - California Office

Mr. Wurzberger brings to this assignment over twenty-nine years of diverse public sector experience, serving for the past seventeen years as a consultant to local government in California and throughout the country. He specializes in public sector search and holds a Bachelor's Degree in English from San Diego State University. Mr. Wurzberger established the Mercer Group's California office nine years ago. He most recently served as lead consultant in the recruitments of Airport Director for the City of Dayton, Ohio, Fire Chief for the City of Tracy, Director of Health for the Northern Kentucky Health Department, and Fire Chief and Deputy Chief, Operations for the Sacramento Metropolitan Fire District. He served as lead consultant in the recruitment and selection of the General Manager of the Hampton Roads Sanitation District in Virginia Beach, Virginia, one of the highest performing and most progressively managed sanitation districts in the country. While serving with his previous firm, Mr. Wurzberger assisted in the recruitment of the Director of Administration for the Central Contra Costa Sanitary District in 2001.

Mr. Wurzberger previously served for seven years as Senior Associate with Hughes, Perry

& Associates, a highly regarded California-based public sector management consulting firm. He has also served as Vice President in the San Francisco office of Boyden International, one of the country's top ten executive search firms. He previously was appointed a senior-level personnel manager within the U.S. Departments of State and Defense in Washington, D.C. and was selected as a member of the U.S. Senior Executive Service. He has always been actively involved in his community and served for five years on the Board of Directors of The Cow Palace in San Francisco, a multi-purpose agricultural and entertainment facility that hosts national and regional events on behalf of the State of California.

3. Karolyn Prince-Mercer, Vice President - Santa Fe Office

Ms. Prince-Mercer received her Bachelor of Arts degree in History with minors in Art, Political Science and Education from the University of Nevada. She received her Doctor of Jurisprudence degree from Woodrow Wilson College of Law. She is licensed to practice law in New Mexico and in Georgia. Ms. Prince-Mercer is also qualified to administer and interpret the Myers-Briggs Type Indicator (MBTI) instruments.

Ms. Prince-Mercer has been in management consulting for twenty years. She has experience working in executive search, compensation and classification, and organization and management studies.

4. Time Commitments

Our firm and Mr. Mercer have the quality time to devote to this search so as to meet the Isle of Palms's needs.

V. THE MERCER GROUP, INC. GUARANTEES

The ten (10) guarantees of our search work are explained below:

1. **Client Organization:** The client is defined as the entire entity, including all departments, divisions, sections and groups. This assures that all of our guarantees apply to the entire client organization.

2. **Two-Year Off Limits:** We will not recruit candidates from a client organization for two years after completion of a search assignment without the full agreement of the client.

3. **Placement Off Limits Forever:** We will never recruit a candidate whom we have placed in a client organization as long as he/she is employed by that organization without the full agreement of the client.
4. **Continue the Search:** If, for any reason, the client does not feel comfortable selecting a candidate from our original recommended group of candidates, we will continue the search until the client can make a selection. The only caveat is that we may need to charge additional out-of-pocket expenses only for this additional work.

5. **Replacement of Successful Candidate:** If the candidate we place with the client leaves the client organization for any reason during the 24 month period following the date of placement with the client, we will replace the candidate for the out-of-pocket expenses only that it costs us to make the new placement.

6. **Parallel Candidate Presentation:** We will not present a candidate simultaneously to more than one client. This permits our firm to represent one client organization without any conflicts of interest.

7. **Client Conflicts:** If asked, we will disclose to our clients the names of the organizations which are "Off Limits" that logically would be target organizations on the new search assignment.

8. **Deceptive/Misleading Search Techniques:** We commit to our clients and to our prospective candidates that we will not use any search techniques which may be considered as deceptive or misleading.

9. **Resume Floating:** We will not float resumes to organizations in the hopes that we can collect a fee if that individual is hired.

10. **Not Represent Individuals:** We assure our clients and individuals who may become candidates that we will not collect a fee from candidates whom we may recommend for a position.

VI. REFERENCES

Ms. Stephanie Tillerson, Town Administrator
Town of Kiawah Island
21 Beachwalker Drive
Kiawah Island, SC 29544
843-768-9166
stillerson@kiawahisland.org

Mr. Jim Prosser, Executive Director
Centralina Council of Governments
525 N Tryon
Charlotte, NC 28202
704-348-2703
prosser.jim@gmail.com
Executive Director Search for Centralina Council of Governments

City, Town and Village Administrators and Managers

City Managers/Administrators

Angel Fire, New Mexico - Town Administrator (Limited Scope Search) - 2000
Ann Arbor, Michigan - City Administrator - 2001
Ann Arbor, Michigan - City Administrator - 1995
Ann Arbor, Michigan - City Administrator - 1988
Augusta, Georgia - Administrator - 2014
Beacon, New York - City Administrator - 2015
Billings, Montana - City Administrator - 2006
Billings, Montana - City Administrator - 2003
Billings, Montana - City Administrator - 1999
Billings, Montana - Assistant City Administrator - 2003
Billings, Montana - Deputy City Administrator - 2003
Bridgeport, Texas - City Administrator - 2010
Chesapeake Beach, Maryland - Town Administrator - 2014
Clayton, Missouri - City Manager - 2003
Davie, Florida - Town Administrator - 1999
Elkhart, Kansas - City Administrator (Limited Scope Search) - 2000
Erie, Colorado - Town Administrator - 2011
Estes Park, Colorado - Town Administrator - 2011
Fairfield, Iowa - City Administrator - 2010
Fairmont, Minnesota - City Administrator - 1988
Flint, Michigan - City Administrator - 2001
Fort Smith, Arkansas - City Administrator - 2008
Fort Smith, Arkansas - City Administrator - 2006
Franklin Village, Michigan - Village Administrator - 1998
Glenwood, Illinois - Village Administrator - 2008
Grand Island, Nebraska - City Administrator - 2007
Grand Ledge, Michigan - City Administrator - 1999
League City, Texas - City Administrator - 2009
League City, Texas - City Administrator - 2004
Macon, Georgia - Chief Administrative Officer - 2008
Milliken, Colorado - Town Administrator - 2014
Minster, Ohio - Village Administrator - 1986
Monmouth, Illinois - City Administrator - 2007
Muscatine, Iowa - City Administrator - 2009
Northville Township, Michigan - Township Administrator - 1999
Orlando, Florida - Chief Administrative Officer - 2005
Parker, Colorado - Town Administrator - 2005
Prairie Village, Kansas - City Administrator - 2007
Questa, New Mexico - Village Administrator - 2011
Richmond, Virginia - Chief Administrative Officer - 2009
Rio Rancho, New Mexico - City Administrator - 2003
South Brunswick Township, New Jersey - Township Administrator - 1987
South St. Paul, Minnesota - City Administrator - 2018
Southfield, Michigan - City Administrator - 1999
Sun Valley, Idaho - City Administrator - 2012

Topeka, Kansas - Chief Administrative Officer - 2002
Union City, Georgia - City Administrator - 2007
Wentzville, Missouri - City Administrator - 2013
Wentzville, Missouri - City Administrator - 2012
Westminster, Maryland - City Administrator - 2006
White House, Tennessee - City Administrator - 2012
White House, Tennessee - City Administrator - 2005
York, Pennsylvania - Business Administrator & Assistant Solicitor - 2000

Protected Classes

Alachua County, Florida - County Administrator - 1984
Angel Fire, New Mexico - Villager Administrator - 2011
Augusta, Georgia - City Administrator - 2013
Billings, Montana - City Administrator - 2006
Billings, Montana - Assistant City Administrator - 2003
Franklin Village, Michigan - Village Administrator - 1998
Jackson County, Missouri - Deputy Chief Administrative Officer - 2007
Johnson County, Kansas - County Administrator - 1998
Kiawah Island, South Carolina - Town Administrator - 2015
Leon County, Florida - County Administrator - 1989
Los Alamos County, New Mexico - County Administrator - 2003
Martin County, Florida - Assistant County Administrator - 2006
Mesa County, Colorado - County Administrator - 2011
Orlando, Florida - Chief Administrative Officer - 2005
Questa, New Mexico - Village Administrator - 2011
Richland County, South Carolina - County Administrator - 2006
Richmond, Virginia - Chief Administrative Officer - 2009
Sun Valley, Idaho - City Administrator - 2012
Village of Questa, New Mexico - Village Administrator - 2011
Westminster, Maryland - City Administrator - 2006
White House, Tennessee - City Administrator - 2005

POLICE CHIEF SEARCHS

Public Safety

Aptos/La Selva Fire Protection District, Aptos, California – Fire Chief - 2017
Belding, Michigan - Chief of Police – 1998
Bellevue, Washington – Fire Chief - 2018
Bowie, Maryland - Chief of Police – 2010
Bowie, Maryland - Chief of Police – 2006
Bozeman, Montana - Chief of Police – 2010
Bryan, Texas - Chief of Police – 2003
*Carlsbad, California - Chief of Police – 2000
Cedar Rapids, Iowa - Chief of Police – 2012
Charter Township of Meridian, Michigan - Chief of Police – 1998
Clayton, Missouri - Chief of Police – 2013
Danville, Kentucky - Police Chief – 2012
Davenport, Iowa - Chief of Police – 2000
Daytona Beach, Florida - Police Chief – 2006
Des Moines, Iowa - Chief of Police – 2007
East Lansing, Michigan - Chief of Police – 1991
Edmond, Oklahoma - Chief of Police – 2003
Eloy, Arizona - Chief of Police – 2000
Franklin, Tennessee - Chief of Police – 2010
Fredericksburg, Virginia - Chief of Police -2004
Gardner, Kansas - Chief of Police – 2014
Goodyear, Arizona - Police Chief – 2011
Greeley, Colorado - Chief of Police – 2005
*Greenfield, California - Chief of Police – 1999
*Greenfield, California - Chief of Police – 1997
Greensboro, North Carolina - Chief of Police – 1998
Hanover, New Hampshire - Chief of Police – 2013
Hanover Park, Illinois - Chief of Police – 1998
Hanover Park, Illinois - Chief of Police – 1996
*Hayward, California - Chief of Police – 1995
*Healdsburg, California - Chief of Police – 2001
Holly Springs, Georgia - Chief of Police (Limited Scope) – 2005
Huber Heights, Ohio - Deputy Chief of Police – 2003
Jackson, Michigan - Chief of Police – 1996
Jacksonville, North Carolina - Chief of Police – 2004
Jacksonville, North Carolina - Chief of Police – 1996
Key West, Florida - Chief of Police – 1998
Laredo, Texas - Chief of Police – 2008
Largo, Florida – Fire Chief - 2018
Lebanon, New Hampshire - Chief of Police – 2015
*Livermore, California - Chief of Police – 2002
Longboat Key, Florida - Chief of Police – 1996
*Manhattan Beach, California - Chief of Police – 1999
McKinney, Texas - Chief of Police – 2015
Meridian Township, Michigan - Police Chief (Assist) – 2004

Mission Hills, Kansas - Chief of Police – 2007
*Mountain View, California - Police Captain – 1999
Newport, Oregon - Police Chief – 2002
Newport News, Virginia - Chief of Police – 2004
Newport News, Virginia - Chief of Police – 1997
Newport News, Virginia - Chief of Police – 1983
Norfolk, Virginia - Chief of Police – 1993
Northglenn, Colorado - Chief of Police – 2001
North Huntingdon Township, Pennsylvania - Chief of Police – 2004
North Little Rock, Arkansas - Chief of Police – 1988
Oak Ridge, Tennessee - Chief of Police – 2011
Owosso, Michigan - Chief of Police – 2003
Papillion, Nebraska - Chief of Police – 2000
Plant City, Florida - Police Chief – 2014
*Pleasanton, California - Chief of Police – 1999
*Pleasanton, California - Police Lieutenant – 2002
Port of Los Angeles, California – Deputy Chief of Police – 2016
Port of Los Angeles, California – Assistant Chief of Police – 2016
Port of Los Angeles, California - Deputy Chief of Police – 2014
Portsmouth, Virginia – Chief of Police – 2015
Portsmouth, Virginia - Chief of Police – 1997
Prairie Village, Kansas - Chief of Police – 2007
Prescott Valley, Arizona - Chief of Police – 2013
Raleigh, North Carolina - Chief of Police – 1971
*Reno, Nevada - Chief of Police – 1997
Rhode Island Airport Corporation - Airport Chief of Police – 2009
Riverdale, Georgia - Chief of Police – 2000
San Fernando, California - Police Chief – 2011
*San Mateo, California - Chief of Police - 2000
*Santa Rosa, California - Chief of Police – 1996
Sarasota, Florida - Chief of Police – 1987
Savannah, Georgia –Chief of Police - 2018
*Simi Valley, California - Chief of Police – 1995
Southlake, Texas - Police Chief – 2005
St. Petersburg, Florida - Police Chief – 2014
Suffolk, Virginia - Chief of Police – 2001
Takoma Park, Maryland - Chief of Police – 2012
Takoma Park, Maryland - Chief of Police – 2006
Taos, New Mexico - Chief of Police – 2012
Taos, New Mexico - Chief of Police – 2002
    Police Lieutenant - 2002
    Police Sergeant (2) - 2002
    Police Patrol Officers (2) – 2002
Tracy, California - Chief of Police – 2008
*Tracy, California - Chief of Police – 1997
West Des Moines, Iowa - Chief of Police – 2012
Wilmington, North Carolina - Chief of Police – 1997
Winchester, Virginia - Chief of Police (Limited Scope) – 2005
Yakima, Washington - Police Chief – 2011

Protected Classes

Danville, Kentucky - Chief of Police – 2012
Des Moines, Iowa - Chief of Police – 2007
East Lansing, Michigan - Chief of Police – 1991
Greensboro, North Carolina - Chief of Police – 1998
Laredo, Texas - Chief of Police – 2008
Norfolk, Virginia - Chief of Police – 1993
Oak Ridge, Tennessee - Chief of Police – 2011
Owosso, Michigan - Chief of Police – 2002
Portsmouth, Virginia - Chief of Police – 1998
*San Mateo, California - Chief of Police – 2000
Taos, New Mexico - Town Police Sergeant – 2003
Tracy, California - Chief of Police – 2008

PUBLIC WORKS SEARCH LIST

Public Works/Engineering

Arvada, Colorado - Traffic Engineer - 2014
Aurora, Colorado - Public Works Director - 1989
Avondale, Arizona - Director of Utilities - 2002
Avondale, Arizona - Development Services Director - 2002
Bexar County, Texas - Executive Director Infrastructure Services - 1999
Bexar Metropolitan Water District, San Antonio, Texas - General Manager - 2009
Billings, Montana - Director of Public Works - 2001
Champaign, Illinois - Director of Public Works (Limited Scope Search) 2004
Chesapeake, Virginia - Project Director, Route 168 Road Project (Limited Scope Search) - 1999
Clayton, Missouri - Public Works Director - 2013
Clearwater, Florida - Public Works Division Director/Transportation and Drainage - 1998
Clearwater, Florida - Public Works Division Director/Utilities - 1998
*Contra Costa County Central Sanitary District - Director of Administration - 2001
Danville, Virginia - 1999
- Senior Civil Engineer
- Gas Engineer
- Water Engineer
- Senior Electric Engineer
- Electric Engineer (2)
Daytona Beach, Florida - Public Works Director - 2006
DeKalb County, Georgia - Public Works Director - 1996
*Delta Diablo Sanitation District - Administrative Services Manager - 2001
Eloy, Arizona - City Engineer - 2000
Fayetteville, North Carolina - Engineering Manager (Limited Scope Search) - 2000
Fort Lauderdale, Florida - Public Works Director - 2004
Fort Lauderdale, Florida - Construction Manager - 2004
Fort Lauderdale, Florida - Resource Recovery Board, Broward Solid Waste Disposal District, Executive Director - 2000
Garland, Texas - Solid Waste Collections Manager - 2010
Garland, Texas - Disposal Operations Manager - 2010
Genesee County Road Commission, Flint, Michigan - Engineering Position - 2001
Genesee County Road Board, Michigan - Manager-Director - 1999
Genesee County Road Board, Michigan - Chief Engineer - 1999
Glastonbury, Connecticut - Director of Building Services - 2000
*Glendale, California - Customer Service Administrator - 1996
Grapevine, Texas - Public Works Director - 1986
Green Bay Metropolitan Sewerage District - Executive Director - 2006
Greensboro, North Carolina - Director of Transportation - 2000
Hampton Roads Sanitation District, Virginia - General Manager - 2006
Hanover Park (Village), Illinois - Public Works Director - 2001
Henry County Public Service Authority, Virginia - Director of Regulatory Compliance and Technical Applications - 2000
Highland Park, Michigan - Interim Public Works Director - 2002-2003
Hernando County, Florida - Engineering Division Manager, Environmental Services - 2013

Indian Rocks Beach, Florida - Public Services Director (Limited Scope Search) - 1996
*Irvine, California - Public Works Director - 1997
Jacksonville, Florida - Director of Public Works - 1999
Kansas City, Missouri - Deputy Director of Public Works - 2006
Kansas City, Missouri - City Engineer - 2006
Kansas City, Missouri - Manager of Facilities - 2006
*La Quinta, California - Public Works Director - 2002
*Lake Arrowhead Community Services District - F.D. - Finance Director/District Engineer - 2000
Lea County, New Mexico - Public Works Director - 2010
Little Rock, Arkansas - Public Works Director (Technology Agent) - 1973
*Livermore, California - City Engineer - 1999
Loudoun County, Virginia - Director of Transportation - 2008
Los Angeles, California - General Manager, General Services Department - 2000
Marietta, Georgia - Public Works Director - 2006
Martin County, Florida - County Engineer/Public Services Director - 1998
Meridian Township, Michigan - Public Works Director - 1998
Monroe, North Carolina - Water Resources Director - 1998
Mooresville, North Carolina - Manager of Engineering - 2008
*Morgan Hill, California - Public Works Director - 1995
*Napa Sanitation District - General Manager - 1998
*Newark, California - Public Works Director - 1995
New Orleans, Louisiana - Director of Capital Projects - 2008
Norfolk, Virginia - Senior Civil Engineer - 1989
Norfolk, Virginia - Waste Management Superintendent - 1999
Orlando, Florida - Public Works Director - 2004
Osceola County, Florida - Building Department Director - 2005
*Oxnard, California - Public Works Director - 1995
*Pleasanton, California - City Engineer - 2001
*Pleasanton, California - Public Works Director - 2002
*Pleasanton, California - Chief Building Official - 2001
*Pleasanton, California - Deputy Director of Public Works B Operations - 1999
Polk County, Florida - Traffic Engineering Division Director - 2002
Polk County, Florida - Land Development Engineer - 2006
Polk County, Florida - County Engineer - 2006
Port Huron, Michigan - Public Works Director - 1998
Port of Los Angeles, California - Director of Construction and Maintenance (2) - 2008
Prairie Village, Kansas - Public Works Director - 2013
Punta Gorda, Florida - Project Manager (Limited Scope Search Process) - 2004
Rochester Hills, Michigan - Director of Public Services - 2001
Salem, Oregon - Senior Engineering Project Manager (2) - 2007
Salem, Oregon - Engineering Project Manager - 2007
Salem, Oregon - Engineering Program Manager - 2007
Saline County, Kansas - Director of Public Works - 1987
St. Petersburg, Florida - Deputy City Manager for Public Works - 1988
San Jose, California - Deputy Public Works Director for City Facilities - 2003
*San Mateo, California - Public Works Director - 2000
*Santa Clara, California - City Engineer - 2000

*Santa Clara, California - Public Works Director - 2000
Sarasota County, Florida - Chief Building Officer - 1988
Sioux City, Iowa - City Engineer - 2003
Sioux City, Iowa - Senior Civil Engineer (2) - 2003
Southeastern Public Service Authority, Virginia - Executive Director - 2008
Southeastern Public Service Authority, Virginia - Executive Director - 1998
Spartanburg, South Carolina - Commission of Public Works - General Manager - 1995
Spartanburg, South Carolina - Commission of Public Works - General Manager - 1988
Spartanburg, South Carolina - Commission of Public Works - General Manager - 1986
Spartanburg, South Carolina Sewer District - Director - 1995
Spartanburg, South Carolina Sewer District - Director - 1988
Spartanburg, South Carolina Sewer District - Director - 1986
Spartanburg, South Carolina Housing Authority - Director of Maintenance - 1994
Suffolk, Virginia - Transportation Engineer - 1994
Sumter County, Florida - Engineering Manager - 2006
Sun=n Lake Sebring Improvement District, Florida - General Manager - 2002
*Tracy, California - Chief Building Official - 2001
*Tracy, California - Public Works Director - 1995
*Ventura Regional Sanitation District - General Manager - 1996
Valdosta, Georgia - Traffic Engineer- 2008
Wentzville, Missouri - Public Works Director - 2013
West Des Moines, Iowa - Engineering Manager - 2002
West Des Moines, Iowa - Principal Engineer - 2002
Wichita, Kansas - Director of Public Works and Utilities - 2011
Wichita, Kansas - Assistant Director of Public Works and Utilities - 2011

THE MERCER GROUP, INC.
PUBLIC WORKS DIRECTOR SEARCHES
May 4, 2018

Our firm has conducted executive searches for the following 40 local government Public Works Directors:

Aurora, Colorado	Public Works Director
Billings, Montana	Public Works Director
Champaign, Illinois	Public Works Director
Chesapeake, Virginia	Public Works Director
Clayton, Missouri	Public Works Director
Clearwater, Florida	Public Works Director
Daytona Beach, Florida	Public Works Director
DeKalb County, Georgia	Public Works Director
Fort Lauderdale, Florida	Public Works Director
Grapevine, Texas	Public Works Director
Village of Hanover Park, Illinois	Public Works Director
Highland Park, Michigan	Interim Public Works Director
Irvine, California	Public Works Director
Jacksonville, Florida	Public Works Director
Kansas City, Missouri	Deputy Director of Public Works
La Quinta, California	Public Works Director
Lea County, New Mexico	Public Works Director
Little Rock, Arkansas	Public Works Director
Marietta, Georgia	Public Works Director
Martin County, Florida	Public Works Director
Meridian Township, Michigan	Public Works Director
Morgan Hill, California	Public Works Director
Newark, California	Public Works Director
Orlando, Florida	Public Works Director
Oxnard, California	Public Works Director
Pleasanton, California	Public Works Director
Pleasanton, California	Deputy Director of Public Works
Port Huron, Michigan	Public Works Director
Prairie Village, Kansas	Public Works Director
Rochester Hills, Michigan	Public Works Director
Saline County, Kansas	Public Works Director
St. Petersburg, Florida	Deputy City Manager for Public Works
San Jose, California	Deputy Public Works Director
San Mateo, California	Public Works Director
Santa Clara, California	Public Works Director
Spartanburg Commission of Public Works, South Carolina	General Manager
Tracy, California	Public Works Director
Wentzville, Missouri	Public Works Director
Wichita, Kansas	Dir. of Public Works and Utilities
Wichita, Kansas	Asst. Dir. of Public Works/Utilities

In addition, our firm has conducted comprehensive organization and management studies for the following 25 local government Public Works Departments:

University City, Texas
Santa Barbara County, California
Atlanta, Georgia
Corpus Christi, Texas
Greenville, South Carolina
Houston, Texas
Sparks, Nevada
Tulsa, Oklahoma
Waleska, Georgia
Bowling Green, Kentucky
Brookfield, Wisconsin
Charleston County Commissioners of Public Works, South Carolina
Florence County, South Carolina
West Des Moines, Iowa
Fort Worth, Texas
Milwaukee, Wisconsin
Nantucket, Massachusetts
Needham, Massachusetts
Niles, Illinois
Oro Valley, Arizona
Las Vegas, New Mexico
Reno, Nevada
Sun Prairie, Wisconsin
Waterbury, Connecticut
Port Arthur, Texas

May 4, 2018

Mayor Jiimmy Carroll
Ms. Sandy Ferencz, Personnel Committee Chair
Human Resource Officer
City of Isle of Palms
1207 Palm Boulevard
Isle of Palms, SC 29541

Dear Mayor Carroll & Ms. Ferencz:

Thank you for the opportunity to provide you with a proposal for the City Administrator, Police Chief, and Assistant Public Works Director recruitments and selection processes for the City of Isle of Palms. GovHR USA ("GovHR") prides itself on a tailored, personal approach to executive recruitment and selection, able to adapt to your specific requirements for the position.

Qualifications and Experience

GovHR is a public management consulting firm serving municipal clients and other public-sector entities on a national basis. Our headquarters offices are in Northbrook, Illinois. We are a certified Female Business Enterprise in the State of Illinois and work exclusively in the public sector. GovHR offers customized executive recruitment services and completes other management studies and consulting projects for communities. Please note the following key qualifications of our firm:

- Since our establishment in 2009, our consultants have conducted hundreds of recruitments in 29 states, with an increase in business of at least 30% each year. Twenty-eight (28%) of our clients are repeat clients, the best indicator of satisfaction with our services.

- Surveys of our clients show that 94% rate their overall experience with our firm as *Outstanding and* indicate that they plan to use our services or highly recommend us in the future.

- Our state of the art processes, including extensive use of social media for candidate outreach and skype interviews with potential finalist candidates, ensure a successful recruitment for your organization.

- Our high quality, thorough Recruitment Brochure reflects the knowledge we will have about your community and your organization and will provide important information to potential candidates.

- We provide a two-year guarantee for our recruitments. Less than 1% of our clients have had to invoke the guarantee.

- The firm has a total of twenty-seven consultants, both generalists and specialists (public safety, public works, finance, parks, etc.), who are based in Arizona, Florida, Illinois, Indiana, Michigan, and Wisconsin, as well as five reference specialists and eight support staff.

Our consultants are experienced executive recruiters who have conducted over 600 recruitments, working with cities, counties, special districts and other governmental entities of all sizes throughout the country. In

addition, we have held leadership positions within local government, giving us an understanding of the complexities and challenges facing today's public-sector leaders.

GovHR is led by Heidi Voorhees, President, and Joellen Earl, Chief Executive Officer. Ms. Voorhees previously spent 8 years with the nationally recognized public-sector consulting firm, The PAR Group, and was President of The PAR Group from 2006 – 2009. Ms. Voorhees has conducted more than 250 recruitments in her management consulting career, with many of her clients repeat clients, attesting to the high quality of work performed for them. In addition to her 12 years of executive recruitment and management consulting experience, Ms. Voorhees has 19 years of local government leadership and management service, with ten years as the Village Manager for the Village of Wilmette. Ms. Earl is a seasoned manager, with expertise in public sector human resources management. She has held positions from Human Resources Director and Administrative Services Director to Assistant Town Manager and Assistant County Manager. Ms. Earl has worked in forms of government ranging from Open Town Meeting to Council-Manager and has supervised all municipal and county departments ranging from Public Safety and Public Works to Mental Health and Social Services.

Consultant Assigned

GovHR Vice Presidents Sarah McKee will be responsible for your recruitment and selection process for City Administrator & Assistant Public Works Director. Vice Presidents Joe DeLopez & Lee McCann will be responsible for your recruitment and selection process for Police Chief. Their biographies are attached to this Proposal and their contact information is:

Sarah McKee
Vice President
GovHR USA LLC
Telephone: 847-867-5151
SMcKee@GovHRusa.com

Joseph DeLopez
Vice President
GovHR USA LLC
Telephone: 773-512-2800
JDeLopez@GovHRusa.com

Lee McCann
Vice President
GovHR USA LLC
Telephone: 847-951-0886
LMcCann@GovHRusa.com

A complete list of GovHR's clients is available on our website at www.govhrusa.com

References

The following references can speak to the quality of service provided by GovHR:

Alachua County, FL
(Human Resources Director, 2018) – Sarah McKee
(Court Services Director, 2018) - Sarah McKee
Gina Peebles, Assistant County Manager
Community and Administrative Services
Alachua County Board of County Commissioners
12 SE 1st Street
Gainesville, FL 32601
352-538-8262
gpeebles@alachuacounty.us

East Dundee, IL (Director of Public Works, 2017) - Sarah McKee
Jennifer Johnsen, Village Manager
120 Barrington Ave.
East Dundee, IL 60118
847-426-2822
jjohnsen@eastdundee.net

East Moline, IL (City Administrator, 2016) – Sarah McKee
Darin Girdler
City Administrator
915 16th Ave
East Moline, IL 61244
309-752-1599
dgirdler@eastmoline.com

Vernon Hills, Illinois (Chief of Police/2017) – McCann/De Lopez
John M. Kalmar, AICP
Village Manager
Village of Vernon Hills
290 Evergreen Drive
Vernon Hills, IL 60061-2999
Telephone: 847-918-3550
JohnK@vhills.org

St. John, IN (Chief of Police, 2015) – Lee McCann and Joe DeLopez
Stephen Kil
Town Manager
10955 W. 93rd Avenue
St. John, IN 46373
219-365-6465
skil@stjohnin.com

Scope of Work

A typical recruitment and selection process takes approximately 175 hours to conduct. At least 50 hours of this time is administrative, including advertisement placement, reference interviews, and due diligence on candidates. We believe our experience and ability to professionally administer your recruitments will provide you with a diverse pool of highly qualified candidates for your City Administrator, Police Chief, and Assistant Public Works Director searches. GovHR clients are informed of the progress of a recruitment throughout the entire process. We are always available by mobile phone or email should you have a question or need information about the recruitment.

GovHR suggests the following approach to your recruitment, subject to your requests for modification:

Phase I – Position Assessment, Position Announcement and Brochure Development

Phase I will include the following steps:

- One-on-one or group interviews will be conducted with elected officials, appointed officials, staff, business community representatives and any other stakeholders identified by the client to develop our Recruitment Brochure. The Proposal assumes up to two full days and one night depending upon the client's needs. We can also utilize dedicated email and surveys to obtain feedback from stakeholder groups. Previous clients have invited community leaders to meetings with our consultants; other clients have developed surveys for the community or organization; and some clients request we use a combination of these methods to fully understand community and organizational needs and expectations for the next City Administrator, Police Chief, and Assistant Public Works Director. We will work closely with you on the format that best meets your needs.

- Development of a **Position Announcement**.

- Development of a detailed **Recruitment Brochure** for your review and approval.

- Agreement on a detailed **Recruitment Timetable** – a typical recruitment takes 90 days from the time you sign the contract until you are ready to appoint the finalist candidate.

Phase II – Advertising, Candidate Recruitment and Outreach

We make extensive use of social media as well as traditional outreach methods to ensure a diverse and highly qualified pool of candidates. In addition, our website is well known in the local government industry – we typically have 5,000 visits to our website each month. Finally, we develop a database customized to your recruitment and can do an email blast to thousands of potential candidates.

Phase II will include the following steps:

- Placement of the Position Announcement in appropriate professional online publications. In addition to public sector publications and websites, outreach will include LinkedIn and other private sector resources. We can provide the City with a list of where we intend to place the position announcement, if requested.

- The development of a database of potential candidates from across the country unique to the position and to the City of Isle of Palms, focusing on the leadership and management skills identified in Phase I as well as size of organization, and experience in addressing challenges and opportunities also outlined in Phase I. This database can range from several hundred to thousands of names depending on the parameters established for the outreach. Outreach will be done in person, and through e-mail and telephone contacts. GovHR consultants have extensive knowledge of the municipal government industry and will personally identify and contact potential candidates. With more than 600 collective years of municipal and consulting experience among our consultants, we often have inside knowledge about candidates.

Phase III – Candidate Evaluation and Screening

Phase III will include the following steps:

- Review and evaluation of candidates' credentials considering the criteria outlined in the Recruitment Brochure.

  Candidates will be interviewed by skype or facetime to fully grasp their qualifications, experience and interpersonal skills. The interviews include asking specific questions about their experiences and skill sets as well as asking questions specific to the City Administrator, Police Chief, and Assistant Public Works Director. We will ask follow up questions and probe specific areas. By utilizing skype or facetime we will have an assessment of their verbal skills and their level of energy for and interest in the position.

- Formal and informal references and an internet/social media search of each candidate will be conducted to further verify candidates' abilities, work ethic, management and leadership skills, analytical skills, interpersonal skills, ability to interact with the media, and any areas identified for improvement.

- All résumés will be acknowledged and contacts and inquiries from candidates will be personally handled by GovHR, ensuring that the City of Isle of Palms' process is professional and well regarded by all who participate.

Phase IV – Presentation of Recommended Candidates

Phase IV will include the following steps:

- GovHR will prepare a Recruitment Report that presents the credentials of those candidates most qualified for the position. You will advise us of the number of reports you will need for the individuals involved in this phase of the recruitment and selection process. We provide a binder which contains the candidate's cover letter and résumé. In addition, we prepare a "mini" résumé for each candidate, so that each candidate's credentials are presented in a uniform way. GovHR will provide you with a log of all candidates who applied. You may also review all the résumés, if requested.

- GovHR will meet with you on-site to review the Recruitment Report and expand upon the information provided. The report will arrive two to three days in advance of the meeting, giving you the opportunity to fully review it. In addition to the written report, we will spend 2 to 3 hours discussing the candidates by reviewing their skype interviews and providing excerpts from the references we will have conducted on the individuals.

Phase V –Interviewing Process

Phase V will include the following steps:

- After the Recruitment Report is presented, the Interviewing Process will be finalized including the discussion of any specific components you deem appropriate, such as a writing sample or oral presentation.

- GovHR will develop the first and second round interview questions for your review and comment. GovHR will provide you with interview books that include the credentials each candidate submits, a set of questions with room for interviewers to make notes, and evaluation sheets to assist interviewers in assessing the candidate's skills and abilities.

- GovHR will work with you to develop an interview schedule for the candidates, coordinating travel and accommodations. In addition to a structured interview with the City, the schedule will incorporate a tour of City of Isle of Palms' facilities and interviews with senior staff, if the City so desires.

- Once candidates for interview are selected, additional references will be contacted, along with verification of educational credentials, criminal court, credit, and motor vehicle and records checks.

- GovHR recommends a two-step interviewing process with (typically) five or six candidates interviewed in the first round. Following this round, we strongly suggest that two or three candidates are selected for second round interviews. Again, we will prepare a second round of interview questions and an evaluation sheet.

- GovHR consultants will be present for all the interviews, serving as a resource and facilitator.

Phase VI – Appointment of Candidate

- GovHR will assist you as much as you request with the salary and benefit negotiations and drafting of an employment agreement, if appropriate.

- GovHR will notify all applicants of the final appointment, providing professional background information on the successful candidate.

Optional Assessment Center

If desired, GovHR will perform an Assessment Center for candidates selected for interview as part of the selection process. An Assessment Center is a very useful tool for evaluating the strengths, weaknesses and skills and abilities of the City of Isle of Palms next Police Chief, and Assistant Public Works Director. GovHR consultants will prepare all the related documents and scoring sheets for a choice of any of three (3) of the following exercises to be completed on the Assessment Center day:

- In-Basket Exercise
- Written/Oral Presentation Exercise
- Leaderless Group Exercise
- Structured Interview
- Budget Analysis Exercise
- Personnel Issues Exercise
- Other exercise of the Client's choosing

Leadership/Personality Assessments

GovHR has experience working with a wide variety of leadership and personality assessment tools, depending on the qualities and experiences the client is seeking in their candidates. These include but are not limited to Luminaspark, Caliper, DISC and others. Typically, these tools cost $300 per candidate to administer. This fee is not included in our proposal.

Optional 360° Evaluation

As a service to the City of Isle of Palms, we offer the option to provide you with a proposal for a 360° performance evaluation for the appointed City Administrator, Police Chief, and Assistant Public Works Director at about six months into their employment. This evaluation will include seeking feedback from both Elected Officials and Department Directors, along with any other constituent the City feels would be relevant and beneficial. This input will be obtained on a confidential basis with comments known only to the consultant. If you are interested in this option, GovHR USA will prepare a proposal for this service.

Recruitment Schedule

A detailed recruitment schedule will be provided in Phase I. The recruitment and selection process typically takes 90 days from the time the contract is signed until the candidate is appointed. We can work with you on a shorter process, should you so desire.

Our typical recruitment process includes the following milestones and deliverables:

➢ Weeks 1 - 2	On-site interviews of City officials and staff, development and approval of recruitment brochure **Deliverable: recruitment brochure**
➢ Weeks 3 - 8	Placement of professional announcements; candidate identification, screening, interview and evaluation by consultant
➢ Week 9	Consultant recommendation to the City of qualified candidates **Deliverable: recruitment report**
➢ Week 10	Selection of candidate finalists by the City; additional

	background and reference checks, report preparation and presentation **Deliverable: interview reports including suggested questions and evaluation sheets**
➢ Weeks 11-12	Interviews of selected finalist candidates; City recommendation of final candidate; negotiation, offer, acceptance and appointment

Summary of Costs	**Price**
Recruitment Fee:	
1st Recruitment Fee:	**$14,000**
2nd Recruitment Fee:	**$13,000**
3rd Recruitment Fee:	**$13,000**
Recruitment Expenses: (not to exceed) ➢ Expenses include consultant travel, postage/shipping, telephone, support services, candidate due diligence efforts. copying etc.	
1st Recruitment Expenses:	**$4,000**
2nd Recruitment Expenses:	**$4,000**
Police Chief Recruitment Expenses (2 consultants):	**$5,000**
(Based on the timing of recruitments, expenses may be shared for two of the recruitments which could potentially lower expenses)	
Advertising: *Advertising costs over $2,500 will be placed only with client approval. If less than $2,500, Client is billed only for actual cost.	
1st Recruitment Advertising	**$2,500***
2nd Recruitment Advertising	**$2,500***
3rd Recruitment Advertising	**$2,500***
Total:	
1st Recruitment Total:	**$20,500****
2nd Recruitment Total:	**$19,500****
3rd Recruitment Total (Police Chief):	**$20,500****
Total for 3 Full Scope Recruitments:	**$60,500****

**This fee does not include travel and accommodations for candidates interviewed. Recruitment brochures are produced as electronic files. Printed brochures can be provided, if requested, for an additional cost of $900 per recruitment.

The above cost proposal is predicated on four consultant visits to the City; the first for the recruitment brochure interview process (up to two full days and one night, depending upon the client's needs; if additional days are needed they will be billed at $500 per half day and $950 for a full day, plus additional hotel charges, if required); the second to present recommended candidates; and the third and fourth for the candidate interview process (second round interviews are often scheduled a week or so following the first round interviews). Any additional consultant visits requested by the City will be billed at $125/hour; $500 for a half day and $950 for a full day. The additional visits may also result in an increase in the travel expenses and those expenses will be billed to the client.

Optional Assessment Center Fee: $6,000*

*The fee for the Assessment Center is $6,000. The fee assumes that the Assessment Center will be held on one day and be limited to no more than five candidates. For each additional candidate, the fee will increase by $750.

The fee includes the preparation and cost of the Assessment Center material, and a written report outlining the findings of the Assessment Center as reported by the Assessors. We will assist the City of Isle of Palms in selecting three (3) professionals from outside the organization to serve as Assessors in evaluating each candidate's strengths and weaknesses. The City will be responsible for paying a $500 stipend to each Assessor (and possibly mileage for the assessors).

The Assessment Center fee does not include lodging, travel and meal expenses for the GovHR facilitator(s) to be on-site for the Assessment Center. Actual expenses will be billed in addition to the $6,000. If the City chooses to add the Assessment Center option, the fees and expenses for this will be billed separately.

Payment for Fees and Services

Professional fees and expenses will be invoiced as follows:

1st Payment: 1/3 of the Recruitment Fee (invoice sent upon acceptance of our proposal).

2nd Payment: 1/3 of the Recruitment Fee and expenses incurred to date (invoice sent following the recommendation of candidates).

Final Payment: 1/3 of the Recruitment Fee and all remaining expenses (invoice sent after recruitment is completed).

Recruitment expenses and the costs for printing the Recruitment Brochure will be itemized in detail. Payment of invoices is due within thirty (30) days of receipt (unless the client advises that its normal payment procedures require 60 days.)

Philosophy

Executive search is an important decision-making process for an organization and our primary goal is to provide our client with the information to make the best hiring decision. Our firm's executive recruitment philosophy embraces a professional process of integrity, trust, and respect toward all parties involved, and complete commitment toward meeting the expressed needs and desires of our client. All of our services are handled by principals of the firm who have established and well-regarded reputations in the search field, as well as actual operating experience in the public management fields in which they now consult. Each has impeccable professional credentials and unblemished personal reputations. Keeping both our client and prospective candidates informed on the status of the recruitment on a regular basis is also an important part of our recruitment process. Our work is carried out in an open manner with particular attention

given toward seeking out critical factors of a client's organization and governance, and utilizing such information respectfully and discreetly in seeking out candidates who truly have the ability to meet the expectations and needs of the client—working strenuously in developing a fully qualified, "best match" candidate pool for client consideration. Our process includes assistance in the critical final interview and selection phases of the recruitment, and availability to both client and candidate for months following the appointment. Our process was developed and refined over the years to meet the special, and often unique, needs and circumstances facing our local government, public management, and related not-for-profit clients.

GovHR Guarantee

It is the policy of GovHR to assist our clients until an acceptable candidate is appointed to the position. Therefore, no additional professional fee would be incurred should the City not make a selection from the initial group of recommended candidates and request additional candidates be developed for interview consideration. Additional reimbursable expenses may be incurred should the situation require consultant travel to City of Isle of Palms beyond the planned four visits.

Upon appointment of a candidate, GovHR provides the following guarantee: should the selected and appointed candidate, at the request of the City or the employee's own determination, leave the employ of the City within the first 24 months of appointment, we will, if desired, conduct one additional recruitment for the cost of expenses and announcements only, if requested to do so within six months of the employee's departure.

In addition, in accordance with the policy of our firm as well as established ethics in the executive search industry, we will not actively recruit the placed employees for a period of five years.

Why Choose GovHR?

We ask you to consider the following as you deliberate:

- We are a leader in the field of local government recruitment and selection with experience in more than 24 states, in communities ranging in population from 1,000 to 1,000,000. More than 28% of our clients are repeat clients showing a high level of satisfaction with our work. We encourage you to call any of our previous clients.

- We are committed to bringing a diverse pool of candidates to your recruitment process. We network extensively with state, city and county management associations, attending more than 20 state and national conferences each year. In addition, we support and attend the meetings of Women Leading Government, the International Hispanic Network, the California Network of Asian Public Administrators, and the National Forum for Black Public Administrators.

- We conduct comprehensive due diligence on candidates. Before we recommend a candidate to you, we will have interviewed them via Skype, conducted reference calls, and media and social media searches. Our knowledge of local government ensures that we can ask probing questions that will verify their expertise.

- We are your partners in this important process. You are welcome to review all the resumes we receive, and we will share our honest assessment of the candidates.

- Our goal is your complete satisfaction. We are committed to working with you until you find the candidate that is the best fit for your position.

We believe we have provided you with a comprehensive proposal; however, if you would like a service that you do not see in our proposal, please let us know. We can most likely accommodate your request.

This proposal will remain in effect for a period of six months from the date of the proposal. We look forward to working with you on this recruitment and selection process!

Sincerely,

Heidi J. Voorhees
President
GovHR USA

Attachment: Consultant Biography

ACCEPTED BY THE CITY OF ISLE OF PALMS, SOUTH CAROLINA

BY: _____

TITLE: _____

_____

CONSULTANT BIOGRAPHY

SARAH MCKEE
Vice President

Sarah McKee is a Vice President with GovHR USA, and has extensive experience as a local government manager and in non-profit management. She has conducted recruitments for a variety of positions including, City Manager/Administrator, Public Works Director, Fire Chief, Human Resource Director, Director of Development Services, Park and Recreation Director, Building Director, Bridge and Road Director, Court Services Director, 911 Center Director, Community and Economic Development Director and non-profit Executive Director in various states including Illinois, Indiana, North Carolina, South Carolina, Florida, Texas, Washington, Montana, West Virginia and Colorado. She has also been involved in studies related to organizational structure/development and strategic planning.

Sarah was a city manager in Johnstown, OH (5,500) and Rolling Meadows, IL (25,000). While managing in Johnstown, the community saw a 20 percent growth in residential and commercial and Sarah was instrumental in establishing their first comprehensive plan as well as a downtown revitalization plan. She was also expanded their industrial park after the park experienced maximum capacity. During her administration, she successfully acquired various grants for community park renovations and led the community through the Main Street application process.

During the recession of 2008, she led Rolling Meadows through a workforce reduction which also included an early incentive retirement program as well as a successful re-negotiation of police and fire contracts for additional cost savings to the City. Additionally, she developed a retention and expansion program for the community's commercial and industrial businesses and attracted additional employers to their corporate centers. During her tenure, she was influential in attracting several new businesses to the area including expansion of several large employers.

Sarah also has extensive experience in Public Works Administration. Having served as a solid waste and fleet superintendent prior to being a public works director, she is known for several innovative ideas that have saved millions of dollars in local governments. While serving as the solid waste superintendent in Paducah, KY, she created the first biosolids waste composting facility in the state. In its first year of operation, the City saved approximately $1M dollars in landfill costs through the diversion of biosolids and yard waste.

Through ICMA's international program and their cooperation with USAID, Sarah was asked to assist the country of Bulgaria in developing their solid waste management program as they transitioned to the European Union. She spent over seven years developing their program and training their environmental experts as well as assisting in the development of their landfills and composting sites. In addition to Bulgaria, Sarah has also worked in Beirut, Lebanon in the development of the Economic Development plan.

Recently, Sarah expanded her experience into non-profit management. She served as the first Executive Director of the Issaquah Highlands Community Association. Issaquah Highlands is an award winning, large scale master planned, built green urban village located just east of Seattle, WA. The community association is responsible for the governance and management of over 4,000 housing units as well as commercial (including a hospital campus) and retail spaces with 1500 acres of open spaces with 22 parks, soccer fields, dog parks, sport courts and play areas. The Association is charged with maintaining all streetscape, storm water systems including its use as irrigation in streetscapes and parks, management of 9 neighborhoods and 13 supplemental neighborhoods including z-Homes (zero based energy homes).

Professional Education, Training and Instruction, Memberships and Affiliations, Awards and Local Government Professional Background

Professional Education

- Master's degree in Public Administration with emphasis in Organizational Communications, Murray State University, KY
- Bachelor of Science degree in Business Administration with emphasis in management, Murray State University, KY

Training and Instruction

Sarah has spoken/presented at various conferences including ICMA's Women's luncheon, Illinois Government Finance Officers Association, Indiana Municipal Managers Association, Illinois City/County Management Association and various other entities related to municipal government. She also serves as a coach for ICMA.

Local Government Professional Background

Extensive experience as a local government manager and in non-profit management

• Executive Director, Issaquah Highlands Community Association, Issaquah, WA	2012-2014
• City Manager, Rolling Meadows, IL	2008-2010
• Village Manager, Johnstown, OH	2003-2008
• Public Works Director, Paducah, KY	1999-2003
• Solid Waste Superintendent/Fleet Superintendent, Paducah, KY	1994-1999

JOSEPH A. DELOPEZ
Vice President

Joseph A. De Lopez is a Vice President with GovHR USA, and an experienced and professional public safety executive and consultant. He has over 41 years of progressively responsible experience covering the spectrum of police management, to include administration, policy development, training, organizational analysis, security risk assessment, expert witness testimony and executive screening activities.

He was formerly the Vice Chancellor for Safety and Security for the City Colleges of Chicago. He was hired by the City Colleges in 2011 to coordinate the centralization and re-organization of the Office of Safety and Security. The City College of Chicago system is comprised of eight primary locations and six satellite locations serving a student population of approximately 120,000. These campuses are located throughout metropolitan Chicago, and are as diverse as the city itself. The Office of Safety and Security provides all the public safety needs of the City College system through the employment of a combination of off-duty and retired members of the Chicago Police Department, the Illinois State Police Department and the Cook County Sheriff's Department. As Vice Chancellor, Mr. De Lopez developed a plan to transition the Office of Safety and Security to a State Certified Police Department. He also implemented procedures to standardize and integrate security technology solutions, and implemented numerous programs and policies to enhance the safety on all of the campuses.

Mr. De Lopez also served as the Chief of Police in Winnetka, Illinois, a community of 12,500 residents 14 miles from downtown Chicago along the shores of Lake Michigan. He was hired as Chief in March of 2002. The Winnetka Police Department had a complement of 36 personnel, and a total budget of approximately

$6.3 million. The Department has been nationally accredited by the Commission on Accreditation for Law Enforcement Agencies. During his tenure as Chief in Winnetka, De Lopez re-organized the Police Department, enhanced training of his personnel through a collaborative effort with Oakton Community College and the Northeastern Illinois Public Training Academy (NIPSTA), where he served in roles as President, Vice-President and as an Officer of the NIPSTA Foundation.

Mr. De Lopez also had a distinguished 31 year career with the Chicago Police Department, rising through the ranks to become Deputy Superintendent. As the Deputy Superintendent of the Bureau of Technical Services for the Chicago Police Department Mr. De Lopez commanded a bureau that was comprised of the police department's Communication Division, Electronics and Motor Maintenance Division, Evidence and Recovered Property Section, and General Support Division. His duties included coordinating police communications issues and needs with the Chicago Office of Emergency Communications, which included the city's Alternate Response Program.

Mr. De Lopez has also been qualified as an expert witness in Federal Court for police operations and administrative matters, and has served as a promotional and executive search assessor for the International Association of Chiefs of Police, Metro Dade Police Department, Illinois State Police, Cook County Department of Personnel, and the Chicago Police Department.

Professional Education, Training and Instruction

- Bachelor's degree in Management, University of Illinois at Chicago, IL
- Master's degree in Criminal and Social Justice, Lewis University, IL
- Police Administration at the Traffic Institute of Northwestern University
- Senior Management Institute for Police in Boston
- Northwestern University's Executive Management Program
- City of Chicago Intergovernmental Executive Development Program
- Federal Bureau of Investigation Law Enforcement Executive Development Program (LEEDS)

Memberships and Affiliations

- Former President for Northeastern Illinois Public Safety Training Academy (NIPSTA)
- NIPSTA Foundation Board of Directors
- International Association of Chiefs of Police
- Illinois Association of Chiefs of Police
- Illinois Police Association

Awards

- Numerous Professional, Civic and Community Awards

Local Government Professional Background:

Over 41 years of police management, administration, policy development, training, expert witness testimony and executive screening activities

• Senior Security Consultant, Elert & Associates	2013-Present
• Vice Chancellor, City Colleges of Chicago	2011-2013
• Chief of Police, Village of Winnetka, IL	2002-2009
• Deputy Superintendent and various Command Positions, Chicago Police Department	1971-2002

LEE MCCANN
Vice President

Lee McCann is a Vice President – Midwest Region for GovHR USA, and has over 36 years of active public safety experience. He works on executive search and general management consulting projects.

Following his honorable discharge from the United States Army, Mr. McCann began his career in local law enforcement as a patrol officer in Evergreen Park, Illinois. He rose through the ranks of that agency, attaining the highest merit position, Lieutenant, in less than ten years. In 1982 he was named Chief of Police in Buffalo Grove, Illinois and served as Chief of Police in Buffalo Grove & Skokie, Illinois for the next 23 years. While serving in Buffalo Grove, he led the police department in becoming one of the first 50 law enforcement agencies in the nation to be accredited.

Mr. McCann accepted numerous leadership roles with intergovernmental agencies during his tenure as Chief of Police. He helped found and manage the Lake County (Illinois) Major Crimes Task Force, served as Chairman of the Executive Committee of the Northwest Central Dispatch System and was President of the Northern Illinois Police Crime Laboratory. He was Secretary of the Executive Board of the Northwest Police Academy for ten years, and was also President of the Northern Illinois Police Alarm System - a mutual aid organization that provides manpower and other specialized services to member agencies during disaster and other emergency situations. During the five years he served as President of this organization, Mr. McCann oversaw a 100% growth in membership to over 80 law enforcement agencies serving a population of approximately 1,000,000 people.

Mr. McCann's consulting experience includes general police management studies, executive search & recruiting assignments, and service as on-site assessment team leader for the Commission on Accreditation for Law Enforcement Agencies since 1987. He also is a member of several professional organizations and has served on the governing boards of civic and charitable organizations such as OMNI Youth Services, United Way and as chairman of the Regional Action Planning Project, a local initiative to suppress street gang activity.

Mr. McCann is a graduate of the F.B.I. National Academy, the Illinois Law Enforcement Executive Institute, and Chicago State University.

Professional Education, Training and Instruction

- FBI National Academy
- Illinois Law Enforcement Executive Institute
- Chicago State University

Memberships and Affiliations

- Helped found and Manager - Lake County (Illinois) Major Crimes Task Force
- Former Chairman of the Executive Committee of the Northwest Central Dispatch System
- Former President of the Northern Illinois Police Crime Laboratory
- Former Secretary of the Executive Board of the Northwest Police Academy
- Former President of the Northern Illinois Police Alarm System
- Former Governing Boards of OMNI Youth Services
- Former Governing Board of United Way

- Former Chairman of the Regional Action Planning Project

Local Government Professional Background

Over 36 years of active public safety experience

- Chief of Police, Skokie, IL
- Chief of Police, Buffalo Grove, IL
- Lieutenant and Various Command Positions, Evergreen Park, IL

GovHR USA offers tiered services to meet your recruitment needs.

GovHR USA
GovTempsUSA

Executive Recruitments

- Develop detailed brochure and position announcement
- Post position announcement to approved advertising sources, GovHR's social media sources and extensive email outreach
- Candidate evaluation/top candidates selected (approx. 10-20)
- Conduct Skype interview, reference checks, social media and google search of select group
- Presentation of candidates with client (candidate pool narrowed for interview)
- Schedule candidate interviews
- Full background screening, additional reference checks and news media search conducted
- Present draft interview questions
- Consultant present at interviews of top candidates
- Assist with negotiations and offer to selected candidate
- Notify all applicants of appointed candidate

Executive Recruitments – Limited Scope

- Develop two-page flyer and position announcement
- Post position announcement to approved advertising sources, GovHR's social media sources and extensive email outreach
- Candidate evaluation/top candidates selected (approx. 10-20)
- Conduct Skype interview, reference checks, social media and google search of select group
- Presentation of candidates with client (candidate pool narrowed for interview)
- Notify all applicants of appointed candidate

Virtual Recruitments

- Develop two-page position announcement
- Post position announcement to approved advertising sources and GovHR's social media sources
- Prepare assessment matrix that matches candidate's qualifications against position requirements
- Schedule candidate interviews
- Present draft interview questions
- Share announcement with GovHR's professional network
- Conduct reference checks for finalist candidate
- Submit top tier candidates to client immediately after deadline

Professional Outreach

- Develop two-page position announcement
- Post position announcement to approved advertising sources and GovHR's social media sources
- Share announcement with GovHR's professional network
- Submit all resumes to client immediately after deadline

GovHR USA

847-380-3240

info@GovHRusa.com

www.GovHRusa.com

Contact Us for a Price Quote.

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Executive Recruitment for

BEAUFORT COUNTY, SOUTH CAROLINA

COUNTY ADMINISTRATOR

GovHR USA is pleased to announce the recruitment and selection process for the County of Beaufort, South Carolina's County Administrator. This brochure provides background information on Beaufort County as well as the requirements and expected qualifications for the position. Candidates interested in applying should submit resume, cover letter and
contact information for three professional references at http://www.govhrusa.com/current-positions/recruitment by May 11, 2018 to the attention of Sarah McKee, Vice-President, GovHRUSA, 630 Dundee Road #130, Northbrook, IL 60062. Tel: (847) 380-3243.

Sarah McKee, Vice President

GovHRUSA, LLC
630 Dundee Road, Suite 130
Northbrook, Illinois 60062
TEL: 847-380-3240
FAX: 866-401-3100
Formal Applications should be submitted to:
www.govhrusa.com/current-positions/recruitment

BEAUFORT COUNTY SOUTH CAROLINA
1769

PROFESSIONAL ANNOUNCEMENT

BEAUFORT COUNTY, SOUTH CAROLINA (Population: 179,589) is seeking energetic, professional and accomplished candidates for their next County Administrator. Ideal candidates will have well rounded management experience in a community or county of similar size and complexity as Beaufort County. Located in the southeastern corner of the State of South Carolina, known as the "Lowcountry." Nestled between Charleston, South Carolina and Savannah, Georgia - Beaufort County is rich with history, culture and outdoor beauty. Beaufort County is composed of hundreds of barrier and sea islands and its warm climate, pristine beaches, vibrant Gullah traditions and true southern hospitality welcome visitors from all over the world throughout the year. Beaufort County is home to the famous Parris Island Marine Corps Recruit Depot, the Marine Corps Air Station and the internationally known luxury resort of Hilton Head Island. Gorgeous private islands, abundant waterways and nature preserves embellish the landscape. Vast expanses of marshlands and lush maritime forests create spectacular scenic vistas and rich habitat for egrets, herons, pelicans, dolphins and other wildlife species.

The County is one of the fastest growing areas in South Carolina with an increase in population of 93,164 from 1990 to 2016 to its current size of approximately 175,000. The County is a center for tourism, retirement and the associated services, as well as the military serving in South Carolina. The County has a balanced and very stable economy, created by diverse public and private employers, with the unemployment rate well below the statewide average and that of the neighboring counties. Beaufort County stretches nearly 30 miles along the Atlantic Ocean and includes 64 major islands and hundreds of small islands. It has thriving cities, rich agricultural land and many small communities that contribute to its character and exceptional quality of life.

The successful candidate will have the following qualifications and experiences:

- A strong commitment to creative problem-solving through teamwork and professionalism, outstanding supervisory and administrative skills, highly developed interpersonal and oral/written communication skills and ability to develop policies and procedures that evolve with the organization.
- A demonstrated record of leadership with a comprehensive knowledge of county/city management, governmental finances and budgeting, strategic planning and consensus building as well as the ability to facilitate the development of a strong solutions based, resident focused administration that adheres to the County's core values.

- A bachelor's degree in public administration, public policy, business or related field and a Master's in Public/Business Administration from an accredited college or university is required along with extensive progressively responsible experience (7 to 10 years) in local government management, including significant experience at a senior level interacting with elected officials and other stakeholder groups.
- The salary range is $175,000 - $215,000 DOQ with a fantastic benefits package. Apply at www.GovHRUSA.com/current-positions/recruitment with resume, cover letter and contact information for three professional references by May 11, 2018 to the attention of Sarah McKee, Vice-President, GovHRUSA, 630 Dundee Road #130, Northbrook, IL 60062. Tel: (847) 380-3243.

COMMUNITY INFORMATION

BEAUFORT COUNTY, SOUTH CAROLINA is located in the southeastern corner of the State of South Carolina, known as the "Lowcountry." Nestled between Charleston, South Carolina and Savannah, Georgia - Beaufort County is rich with history, culture and outdoor beauty. Beaufort County is composed of hundreds of barrier and sea islands and its warm climate, pristine beaches, vibrant Gullah traditions and true southern hospitality welcome visitors from all over the world throughout the year. Beaufort County is home to the famous Parris Island Marine Corps Recruit Depot, the Marine Corps Air Station and the internationally known luxury resort of Hilton Head Island. Gorgeous private islands, abundant waterways and nature preserves embellish the landscape. Vast expanses of marshlands and lush maritime forests create spectacular scenic vistas and rich habitat for egrets, herons, pelicans, dolphins and other wildlife species.

With a total area of approximately 923 square miles, of which approximately 576 square miles or 62% is land and approximately 347 square miles or 38% is water, it is bordered to the south and east by the Atlantic Ocean, to the west by Jasper County, and to the north by Hampton and Colleton Counties. Beaufort County stretches nearly 30 miles along the Atlantic Ocean and includes 64 major islands and hundreds of small islands. It has thriving cities, rich agricultural land and many small communities that contribute to its character and exceptional quality of life.

The County is one of the fastest growing areas in South Carolina with an increase in population of 93,164 from 1990 to 2016 to its current size of approximately 175,000. The County is a center for tourism, retirement and the associated services, as well as the military serving in South Carolina. The County has a balanced and very stable economy, created by diverse public and private employers, with the unemployment rate well below the statewide average and that of the neighboring counties. The local tax base has grown an average of approximately 2% per year over the last five years (discounting the reassessment years).

In addition to the established resort community of Hilton Head Island, there are several major developments established in southern Beaufort County. These developments include Sun City Hilton Head, with more than 15,000 residents expected at build-out; Spring Island, Callawassie Island, Colleton River Plantation, Belfair, Berkeley Hall, Palmetto Bluff and Westbury Park. As expected, these developments have sparked an increase in commercial and multi-family construction along the Highway 278 and the 170 corridors where major retail, grocery, multi-family and office developments are occurring. Within the Town of Bluffton, Buckwalter Place is the planned location for a Kroger Marketplace store that will be the anchor for a 34-acre mixed-use development. Southern Beaufort County is also impacted by a similar fast-paced growth pattern in the adjacent jurisdictions of Jasper County and the City of Hardeeville. Likewise, in northern Beaufort County, communities, retail, office and various mixed-use developments are continuing to develop at Dataw Island, Lady's Island, Cat Island, Brays Island, Habersham and throughout the City of Beaufort, as well as the Town of Port Royal.

Beaufort County is also the location for three major military installations, the U.S. Marine Corps Recruit Depot located at Parris Island, the Marine Corps Air Station-Beaufort, and the Beaufort Naval Hospital. These locations have benefited by the Department of Defense closing certain other military bases in the nation.

A significant portion of the County is protected through land conservation. Since 1997, the County has successfully protected more than 23,900 acres allowing the County to remain in a natural, undeveloped state for residents and visitors to enjoy. Trees draped in Spanish moss line quaint Old South inspired streets creating an inviting environment and strong quality of life. The varied, cozy and quintessential downtowns of the various municipalities exude hospitality, comfort, and at times a certain refined ease in its shops and restaurants. The varied city, County, and state parks offer world-class natural attractions, waterways, shady pine forests, flora and fauna, and amazing natural South Carolina sunsets.

Beaufort County is a wonderful place to live and work and the area has earned various distinctions over the years including:

- The City of Beaufort has been featured in the New York Times, and named “Best Small Southern Town” by Southern Living, a “Top 25 Small City Arts Destination” by American Style, and a “Top 50 Adventure Town” by National Geographic Adventure.
- Hilton Head Island is on this year’s Condé Nast Traveler Readers’ Choice award-winning island. Among other accolades, Hilton Head Island was also voted #1 Island in the Continental U.S. and #2 Island in the World in 2017 by readers of Travel & Leisure Magazine.
- Robert Wood Johnson Foundation and the University of Wisconsin Population Health Institute named Beaufort County as the healthiest County in South Carolina for 2017.
- Niche named Hardeeville, Burton and Beaufort as #1, #2 and #4 respectively as the most diverse places to live in South Carolina. They also ranked Beaufort County as the #1 County for outdoor activity and #1 as the best places to retire in South Carolina.

ARTS, CULTURAL AND ENTERTAINMENT

Beaufort County also boasts some of the best art museums and theatres in South Carolina. You can find the spirit of the area not only in its people, but in every one of its cultural landmarks. Whether you're attending a show or play at the USBC Center for the Arts or attending one of the many art gallery functions, there are things to do for everyone.

The arts, coupled with various festivals throughout the year in all the communities of Beaufort County, make the area a mecca of cultural and entertainment events for all ages to enjoy. Many facilities and venues offer a wide variety of music and entertainment including the various theatres in the area, many offering free to low-cost events open to the public. Those looking for dinner choices before or after the show won’t be disappointed with great variety of choices in all communities of Beaufort County. With it location on the Atlantic Ocean, seafood lovers will find a great variety of dining choices with specials varied throughout the year based upon what is in season.

OUTDOOR/INDOOR ACTIVITIES

Beaufort County is an outdoor enthusiast's dream destination. With world-class fishing, snorkeling, canoeing, paddle boarding and kayaking, there's always plenty to do on the water. On land, enjoy birding, hiking, running, biking, fishing and pretty much everything else under the sun. It's all made possible by Mother Nature herself.

Experience the history of America at the Beaufort History Museum as you wonder through displays of more than 500 years of Beaufort’s past, bringing to life the events that shaped the development of America. Many of the communities offer walking and carriage tours to showcase the diverse history of Beaufort County. The area is blessed with historical places and parks like Parris Island, Penn Center, Fort Fremont and Church of the Crosses, three of many such places that not only offer incredible history of the area, but also generously provide people activities that simply don't exist anywhere else.

If the thrill of finding a great buy sounds exciting, the County offers both indoor and outdoor shopping venues. Stroll through the streets of various downtown’s in the area and you will find local shops, galleries, studios and even Farmer’s Markets at which you will likely find treasures made from local sweet grass.

SCHOOL SYSTEM/EDUCATIONAL OPPORTUNITIES

The University of South Carolina Beaufort is a public university serving nearly 2,000 students with two campuses located in the Lowcountry region of South Carolina. The larger "Hilton Head Gateway" campus is located between Bluffton and Hardeeville near Hilton Head Island. The original historic Beaufort Campus is located in downtown Beaufort. USCB is one of the 3 senior campuses in the University of South Carolina system and is a Southern Association of Colleges and Schools accredited four-year university.

USCB offers the region's only human services degree as well as more traditional degrees like English, psychology, business and education. The school opened a nursing facility in the Spring of 2009 creating greater learning opportunities for its nursing students. Another popular program capitalizing on nearby Hilton Head island is the hospitality management program which draws international students and provides internship experiences. The biology program allows students to explore and study first-hand the continental-shelf and estuarine with a new concentration in coastal ecology and conservation.

USCB is also home to the Lowcountry and Resort Islands Tourism Institute (LRITI). The South Carolina Lowcountry region provides tourists a rich, distinct, and diverse vacation experience. In order to provide and enhance those experiences, conducting tourism research, understanding issues, and discovering trends are vital. Therefore, the primary goal of the LRITI is to investigate, examine, and interpret tourism information that will support the tourism directives for Beaufort, Jasper, Colleton, and Hampton Counties. The LRITI is affiliated with the Department of Hospitality Management at University of South Carolina Beaufort.

Additionally, Beaufort County is home to the Technical College of the Lowcountry, (often abbreviated as TCL) a comprehensive, two-year community college serving the Lowcountry region of South Carolina.

Additionally, the Osher LifeLong Learning Institute (OLLI) at the University of South Carolina Beaufort is a membership-led organization that stimulates minds among people 50 years of age and older in the Lowcountry of South Carolina. OLLI offers stimulating courses, lectures, and educational travel and opportunities to meet others with similar interests.

All of Beaufort County is served by the Beaufort County School District. The District is comprised of 31 total schools including 18 elementary schools, 8 middle schools and 5 high schools with a total school enrollment of over 22,000 students. These numbers also include several charter schools and early education centers.

BEAUFORT COUNTY GOVERNMENT

Beaufort County is a home rule County, governed by a County Council of eleven elected Council members from each of the eleven single-member districts for four-year terms, and operates under the established Council/ Administrator form of government. Additionally, the citizens of Beaufort County elect the Auditor, the Clerk of Court, the Coroner, the Sheriff, the Solicitor and the Treasurer. The County Administrator is appointed by the Beaufort County Council and serves at its pleasure.

The County Administrator's powers and duties are set in state law and include serving as the County's chief Administrative officer; implementing policies, directives and legislative actions adopted by Council; directing and

coordinating operational agencies and administrative activities of the County government; preparing the annual operating and capital improvement budgets for submission to the Council; supervising the expenditure of appropriated funds; preparing annual, monthly and other reports for Council on finances and administrative activities of the County; the administration of County personnel policies including salary and classification plans approved by council; employment and discharge of personnel and the performance of such other duties as may be assigned by the County Council.

Beaufort County has 44 different departments lead by three Assistant County Administrators and three Division Heads reporting through a Deputy County Administrator to the County Administrator. Services include general administrative services, tax assessment and collection, courts and criminal justice administration; detention center, emergency medical services, emergency management, building codes enforcement, animal services; facilities and grounds maintenance, roads and drainage, engineering, solid waste, mosquito control; alcohol and drug abuse programs, disabilities and special needs programs, veterans' services, social services, library, parks and leisure services; traffic engineering and two airports.

Beaufort County is a value-driven organization dedicated to responsive, respectful and courteous customer service. Beaufort County is viewed as an innovative and progressive leader in the provision of effective and efficient County services, recognizing the needs of a diverse community. The County's mission is "serve the people of Beaufort County in a cost-effective manner, so all our citizens may enjoy and appreciate a protected quality of life, natural and developed resources in a coastal environment, a diverse heritage, and economic well-being."

The County Administrator is charged with oversight of a budget of approximately $115 Million. Beaufort County has approximately 1100 full-time equivalent employees.

CHALLENGES/ISSUES FOR THE COUNTY ADMINISTRATOR

In December of 2018, seven of the eleven Council seats have terms that expire. The elections in the fall of 2018 will most likely result in at least four seats with new Council members as four members have announced they will not be running for office. This will create an opportunity to work with new Council members and guide them through the goals and responsibilities of the County Council.

The Administrator will need to embrace the strategic plan for the County and immediately begin working with all departments to implement the goals as outlined within the plan. The County has consistently met the majority of goals established by the County Council and this will need to continue for the financial well-being and stability of the County. This will require innovative ideas and a proactive approach to problem solving and service delivery.

Beaufort County has placed a 1% sales tax referendum on the fall ballot seeking funds to replace and expand the current bridges to Hilton Head Island, Lady's Island corridor improvements and various other transportation improvements throughout the County. Without the passage of these items, the County would not be able to financially build these much-needed infrastructure projects.

Beaufort County's primary economic development engine has been tourism. The County would like to continue to diversify its economic development efforts to areas that do not rely on tourism or a transient population. The ability to attract other types of development for job growth and sustainability is crucial.

With the increasing costs of home prices and construction prices in the County, it is difficult to find affordable

housing. With an emphasis on attracting industry that will pay above-average wages, it is imperative that the County continues to pursue affordable housing for those residents as well as others that may elect to stay in the area after their military service.

CANDIDATE QUALIFICATION CRITERIA

The County Council is seeking Candidates who are strong leaders in County/City Management with a proven record of providing effective leadership in a complex organization, preferably in a County, municipal or other level of government of similar size as Beaufort County. Ideal candidates will be able to drive innovation and move agendas forward in a multi-stakeholder environment. The successful candidate will demonstrate excellent communication skills and significant career success in building collaborative, effective relationships across divisions. Additional experience in strategic planning, budgeting and performance management and complex problem solving with the ability to work effectively in a wide variety of governmental disciplines is important.

The following factors of education, experience, and leadership and management skills have been identified as *ideal* attributes for the County Administrator to possess to function effectively in the position.

EDUCATION AND EXPERIENCE

- A Bachelor's Degree in public administration, public policy, business or related field and a Masters in Public/Business Administration from an accredited college or university.
- Seven to ten years of progressively responsible experience in local government management, including significant experience at a senior level interacting with elected officials and other stakeholder groups
- Candidates must possess proven managerial and interpersonal skills to lead a dynamic financially fit organization in a community with high customer-service expectations, community activism and demand for government transparency.
- Candidates must possess proven managerial abilities, including financial forecasting, revenue enhancement, capital improvement programming and budget development and control.
- Possess real experience in an urban and rural setting with strong constituencies that expect to be heard and to be involved in community problem-solving.
- Demonstrate significant accomplishments in complex project management with the ability to interact with elected officials, senior staff, boards or commissions and community organizations in the development and implementation of project goals and objectives.
- Be skilled in working with elected officials as a group, and in a system of committees, boards and commissions. An appreciation for an active citizenry that expects community-outreach efforts from its government leaders.
- Candidates must have strong analytical skills with the ability to examine programs, budgets and proposed policies for efficiency and effectiveness; candidates must approach local government with a desire to improve processes and procedures in a thoughtful way that inspires directors and managers and other affected employees.

- Have experience in economic development, fostering business-community relationships with the County; be adept at how the County can craft meaningful and sustainable economic development initiatives.

- Have experience leading a large organization through a natural disaster such as a hurricane, flooding, tornado, etc. with a strong understanding of the complexities involved in preparation, response and recovery as well as FEMA reporting and compliance procedures.

- Have the ability to interpret and ensure compliance with applicable Federal, State and local policies, rules, laws and regulations.

- Have a strong understanding of governmental finances and budgetary preparations. Possess the ability to formulate a budget and capital improvement plan and present the proposed budget to County Council in a way that provides the most accurate information and transparency for County operations and financial stability.

- Have extensive experience in delivering written and oral presentations to officials at all levels of the organization, including elected officials.

- Have a proven track record of delegating to staff and fostering an attitude of teamwork and creativity in problem-solving, while ultimately being accountable for the quality and effectiveness of overall performance of the organization.

- Have proven superior communication, interpersonal, and human relations skills, and adeptness at interacting with people possessing a wide variety of attitudes and in a wide variety of situations. Have a willingness to meet with citizens and assist them with issues they have involving County services.

- Have proven and successful managerial skills utilizing a consensus-building, team-oriented approach to managing staff members; have ability to remain accountable for departmental activities without unnecessary micromanagement of senior staff.

- Have experience in making difficult decisions and the ability to explain the reasons for the decision including “no” as an answer.

- Be committed to the community and the County/City Management profession and have a willingness to commit to a long-tenured service in the community including residency.

LEADERSHIP AND MANAGEMENT SKILLS

- Have a balance of technical and leadership/ management skills with people skills a high priority. Have skills in diplomacy and interpersonal skills and the ability to remain objective despite personal feelings towards a situation or person.

- Have the maturity, self-confidence, and strength of professional convictions to provide administrative insights and administrative counsel to the County Council and staff, being able to firmly and diplomatically present professional views and carry out administrative decisions in a timely, professional and impartial manner.

- Have a County-wide perspective and utilize a “we” mentality rather than an “I” mentality in dealing with all County matters. Possess a track record of addressing race, ethnic and culturally based issues in a thoughtful and progressive manner; Be someone who can build bridges and bring people together.

- Establish a lasting credibility with Elected Officials and Division Directors; the ability to develop effective collaborative relationships is vital.

- Have strong communication skills, both orally and in writing, with the ability to interrelate with the public, County Council, department heads, staff and other stakeholders. Have the skills to present to audiences ranging from staff members to the community at large.

- Have the maturity and self-confidence to firmly and diplomatically present professional views, concerns,

and implications of proposed policy actions that may be under consideration by the Beaufort County Council, while also being committed to carrying out final decisions in a timely, professional, and impartial manner.

- Exhibit a style characterized by candor, directness, tactfulness, and diplomacy, with the ability to admit when mistakes were made, and when corrective action needs to be taken.

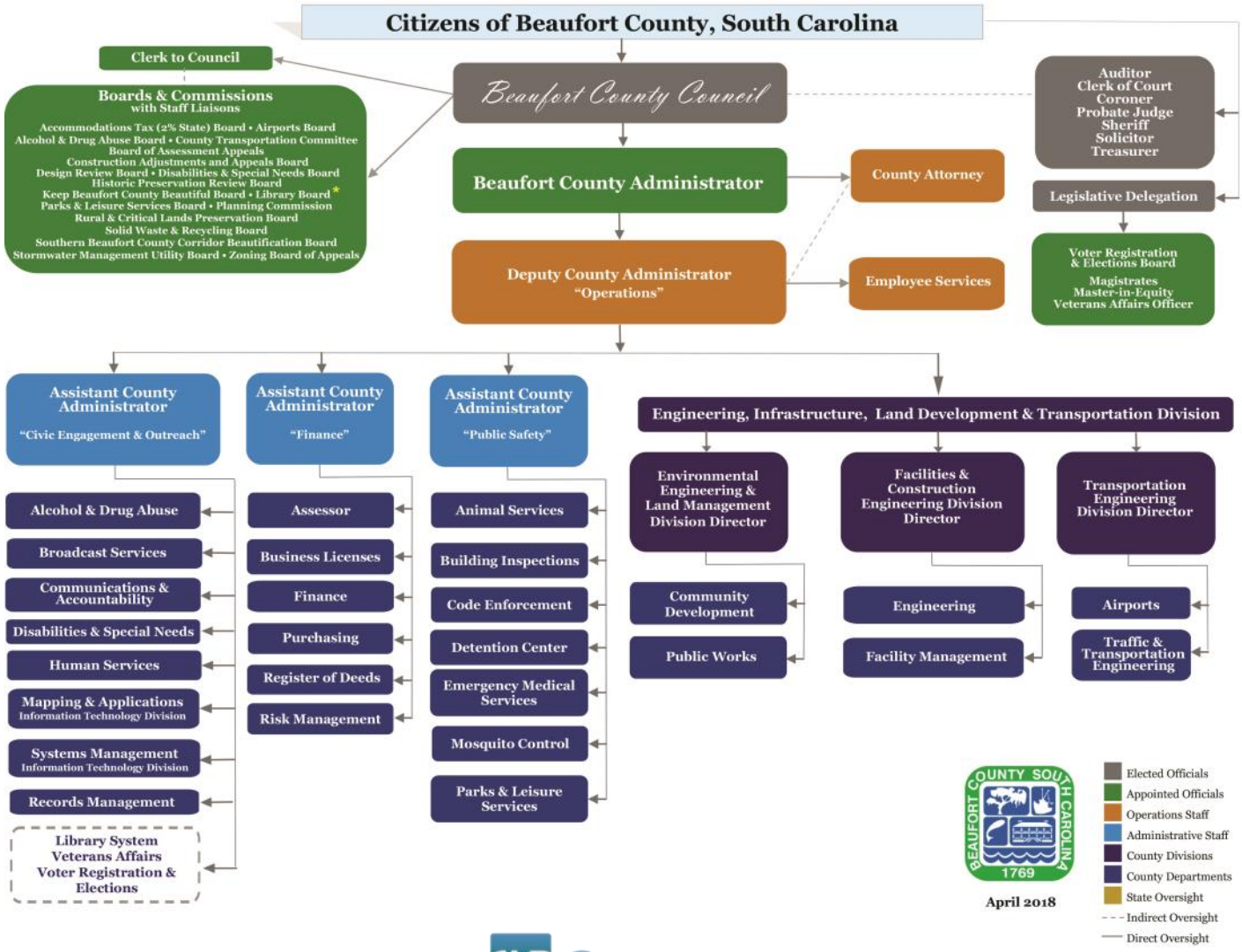
- Have a collaborative and open, friendly personality and management style and be one who can establish trust quickly with others. Know how to deal with conflict in a constructive manner. Have the ability to keep information confidential.

- Be able to represent the County to the residents of Beaufort County in a responsive and helpful manner. Have good listening skills and a willingness to work out challenges in a collegial, respectful manner.

- Maintain a calm demeanor during times of stress, providing thoughtful advice to residents, division heads and elected officials. Have the ability and courage to say "no" when necessary. Be flexible and open to change with a willingness to learn and ask questions. Be assertive when necessary, yet empathetic.

- Be computer literate and have a demonstrated record of understanding and utilizing technology systems and procedures to monitor and measure productivity and provide timely information. Possess proficiency in MS Word, Excel and PowerPoint.

- Have a genuine passion for public service from both an internal standpoint and for service to the community. Have a high energy level and enthusiasm for meeting the challenges and responsibilities of the Administrator's position; have a good work ethic.



COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

PROPOSAL TO PROVIDE EXECUTIVE SEARCH SERVICES FOR CITY ADMINISTRATOR, POLICE CHIEF AND OTHER KEY POSITIONS FOR ISLE OF PALMS, SC

Volume 1

Colin Baenziger & Associates

Project Manager and Contact Person:

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Colin Baenziger & Associates
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Daytona Beach Shores, FL 32118
e-mail: ***Colin@cb-asso.com***
Fax: (888) 635-2430

…Serving Our Clients with a Personal Touch…

PROPOSAL TO PROVIDE
EXECUTIVE SEARCH FIRM SERVICES

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May 3, 2018

The Honorable Mayor Jimmy Carroll, and Personnel Committee Chair Sandy Ferencz
City of Isle of Palms
1207 Palm Blvd
Isle of Palms, SC 29451

The Honorable Mayor Carroll, and Personnel Committee Chair Ferencz:

Colin Baenziger & Associates (CB&A) would like to take this opportunity to submit a proposal to assist in finding your next City Administrator, Police Chief, and other key positions. While selecting key personnel is never easy, CB&A has developed a problem-free process that has been tested nationwide and found to be extremely effective.

CB&A is a municipal recruiting firm with a national reach. We have conducted assignments from Florida to Alaska and Maine to California. We pride ourselves on providing not just high-quality results, but, equally important, providing a great deal of personal attention to each of our local government clients. To conduct a proper recruitment, we feel the project manager must do more than just drop by occasionally. He/she must get to know the appropriate government officials and the community firsthand. That effort takes time, but it is the only way to ensure the candidates we recommend are well qualified and a good fit for your community. As a result, we only take a few clients at a time and focus on getting the job done properly. Further, we routinely complete our work in sixty to ninety days. This timeframe includes preparation of recruitment and advertising materials, candidate outreach, candidate screening, finalist interviewing, and administrator selection. We also offer the best warranty in the industry.

Not only do we offer unparalleled service at a reasonable price, we focus on finding just the right people for your organization. We say people, and not person, because our goal is to bring you five finalists who are so good that you will have a difficult time choosing among them. The proof is in the fact that six of our local government clients have passed resolutions thanking us for our outstanding efforts in finding their key staff. We do not know how often you have passed a resolution thanking a consulting firm for its efforts, but we have rarely seen it happen. Our goal, in fact, would be for you to be our next client to pass such a resolution.

Some of our searches include City Managers/CEOs for Savannah, GA, Doraville, GA, Albany, GA, Ankeny, IA, Ashland, KY, Bellevue, WA, Cottonwood Heights, UT, Fayetteville, NC, Greensboro, NC, Indianola, IA, Jupiter Island, FL, Key Biscayne, FL, Mill Creek, WA, Mountlake Terrace, WA, Mount Pleasant, MI, Norwich, CT, Roanoke, VA, Scottsdale, AZ, Springettsbury Township, PA, Tacoma, WA, Winchester, VA, and Yakima, WA. We have sought the County Administrators / Managers / CEOs for Fulton County, GA, Clackamas County, OR, Polk County, IA, Emmet County, MI, James City County, VA, St. Johns County, FL, Union County, NC, and York County, VA, as well as the Borough Manager for Matanuska-Susitna Borough, Alaska (a county the size of West Virginia).

Some of our current searches include the City Managers for Naples, FL, North Topsail Beach, NC, and Spring Garden Township, PA, an Economic Development Director for Roanoke, VA, a Clerk to the Commission for Fulton County, GA, a Finance Director for Groveland, FL and an Executive Director for the South Correctional Entity (SCORE), Des Moines, WA.

Those authorized to bind the company are myself, Colin Baenziger, and Lynelle Klein, Vice President for Operations.

We look forward to formally presenting our credentials and working with you in the near future. If you have any questions, please feel free to contact me at (561) 707-3537.

Sincerely,

Colin Baenziger
Principal / Owner

…Serving Our Clients with a Personal Touch…

I. Qualifications and Experience of the Firm

The Firm, Its Philosophy, & Its Experience

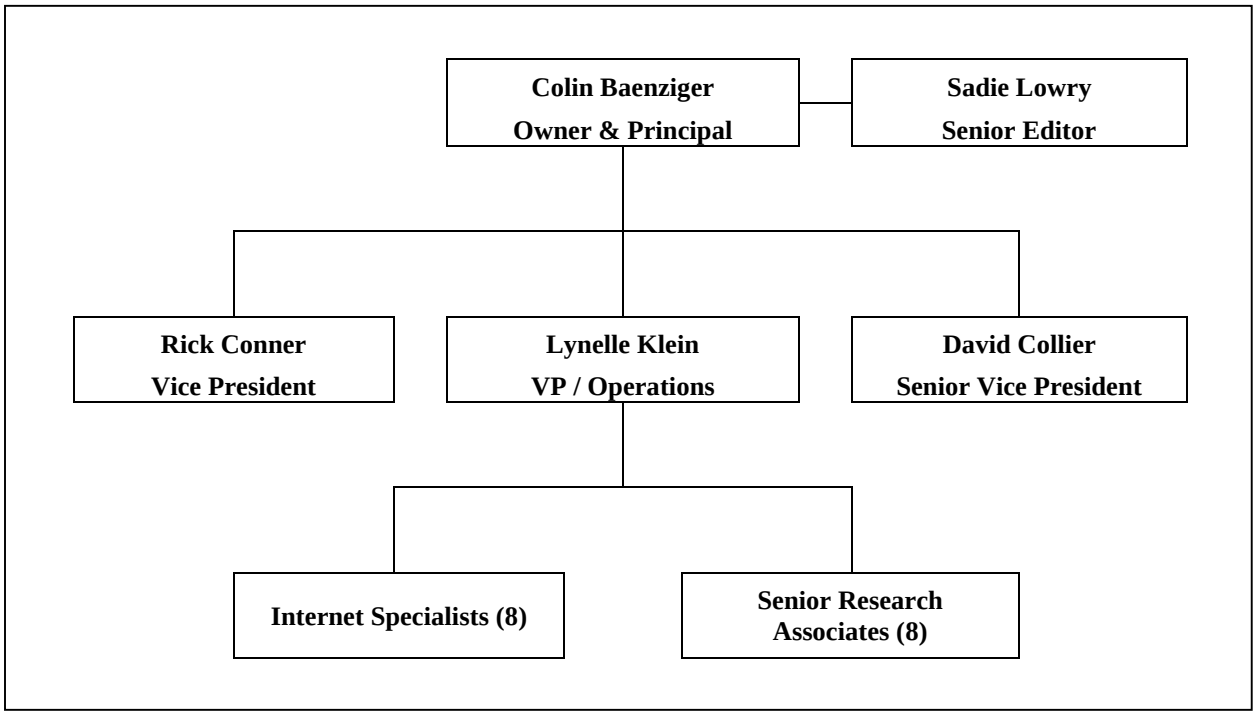
Colin Baenziger & Associates (CB&A) is a nationally recognized executive recruiting firm established in 1997 and owned and operated by Colin Baenziger. We are a sole proprietorship headquartered in Volusia County, FL with an office in Redmond, WA. As a sole proprietorship, we are not registered with any states as a corporation, foreign or otherwise. Although our primary focus is executive search, we are often involved in operational reviews of governmental operations. Our consultants live in other areas of the country and converge wherever the client's needs exist. We develop an operational plan prior to arrival and our team of experts quickly studies the issues, identifies problems and opportunities, performs the necessary analysis, develops solutions, prepares reports and action plans, and completes the assignment. The client receives prompt, professional service, and its needs are effectively addressed. We are available for follow-up work; however, our goal is to provide the client with solutions that its existing staff can implement without additional outside assistance.

Colin Baenziger & Associates' outstanding reputation is derived from our commitment to timeliness and quality. Our work is not done until you are satisfied. That means we go the extra mile and, at times, expend more effort and energy than originally anticipated in our fee or in our action plan. We do not ask the client for additional fees. Rather, we accept these situations as part of our cost of doing business. We believe that once a contract is signed we have an obligation to fulfill its requirements excellently and within the budgeted amount.

Since beginning our search practice in 1998, we have conducted searches and other related work for clients in thirty-two states. Overall our staff has performed over 170 City, County, and Special District Manager searches and approximately 300 local government searches. The basic approach we have presented herein is the approach we have used in each of our searches. It has been refined over the years to the point where it is problem-free.

Technical Capabilities and Organizational Structure

Colin Baenziger & Associates has developed its business model over the past 20 years. The model has proven to be extremely effective in every state where we have applied it and for every type of position for which we have searched. In fact, we are often called when a government has a particularly difficult position to fill or where one of our competitors has failed. Overall, we utilize approximately eighteen people. Most staff members are independent contractors and are given assignments on a task order basis. Consequently, we can pay well while having a great deal of flexibility without the overhead of many firms. In addition to Mr. Baenziger, other senior staff members are former City and/or County Managers or elected officials. As a result, we understand multiple perspectives and have been very successful in identifying the right candidates for our clients. CB&A's other staff are all competent researchers and writers and most have been with us for a long time.



Completion of Projects within Budget

Colin Baenziger & Associates is proud of its record of completing searches within budget. When we quote a price to the client, that price is what the client will pay, no matter how difficult the search is or what unforeseen circumstances may develop. ***We have never asked a search client for additional fees, even when we were entitled to do so.***

Completion of Projects on Schedule

Colin Baenziger & Associates routinely completes its assignments in sixty to ninety days. Further, since CB&A began performing recruitments, ***it has never missed a project milestone***.

Diversity

CB&A has extensive contacts with individuals and organizations representing women and minorities. We are thus able to identify and bring a diverse group of finalists to the City. The proof is that from the beginning of 2009, 32% of our placements have been females and/or minorities with the high in any given year being 47% and the low being 13%.

Prior Names and Litigation

Colin Baenziger & Associates has always operated under its current name and has never been involved in any litigation, except to testify as an expert witness on behalf of one of the parties. Our

performance has never been questioned nor have we or any of our clients been involved in any legal action as a result of our work.

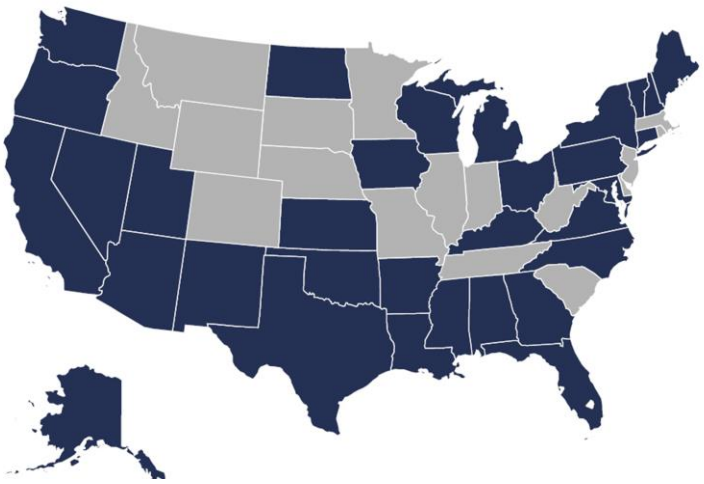
Insurance

To protect our clients, Colin Baenziger & Associates maintains the following insurance coverages: (1) general liability insurance of $1 million combined single limit per occurrence for bodily injury, personal injury, and property damages, (2) automobile liability insurance of $1 million per accident, and (3) professional liability insurance of $1 million per occurrence. As a small firm, predominantly utilizing independent contractors, we are not typically subject to the requirements for workers compensation and employer liability insurance. If required by the client, and if it is available to us, we will obtain these two coverages prior to contract execution.

Overall Executive Search Experience

CB&A started its executive search business in 1998 from scratch. As a single father, he needed to stay nearby and so his goal was to become Florida's preeminent recruiter. In 2007 with his children mature, he branched out into other states. His firm has now worked in 32 states, from Maine to California and Florida to Alaska. See the map below.

We have served clients in the states highlighed in blue.



A complete list of our searches can be found in Appendix A.

2018 City / County Manager Searches Completed					
	Position	**Client**	**Population**	**Placement**	**Agency Size: Number of Employees**
1	City Manager	Groveland, FL	12,493	Mike Hein	121
2	City Administrator	Lake Forest Park, WA	13,059	Phillip Hill	66
3	City Manager	Sebastian, FL	24,772	Paul Carlisle	150

2018 City / County Manager Searches Completed (continued)					
	Client	**Contact Name**	**Title**	**Phone**	**Email**
1	Groveland, FL	Mike Radzik	Council Member/Vice Mayor	(352) 557-3066	Mike.Radzik@groveland-fl.gov
2	Lake Forest Park, WA	Jeff Johnson	Mayor	(206) 368-5440	jjohnson@ci.lake-forest-park.wa.us
3	Sebastian, FL	Jim Hill	Mayor	(727) 224-5246	jhill@cityofsebastian.org

2017 City / County Manager Searches Completed					
	Position	**Client**	**Population**	**Placement**	**Agency Size: Number of Employees**
1	City Manager	Auburn, AL	58,582	James Buston	788
2	City Manager	Aventura, FL	37,724	Susan Grant	182 FT / 16 PT
3	City Manager	Burien, WA	50,500	Brian Wilson	63 FT / 8 PT
4	City Manager	Carnation, WA	1,873	Amy Arrington	12
5	City Manager	Doraville, GA	10,896	Regina Williams-Gates	97 FT / 14 PT
6	City Manager	Fairborn, OH	33,452	Robert Anderson	250
7	City Manager	Parkland, FL	28,200	Robert Payton	80 FT / 74 PT
8	City Manager	Petersburg, VA	32,123	Aretha Ferrell	511
9	City Manager	Roanoke, VA	98,465	Bob Cowell	1,700
10	City Manager	Stuart, FL	16,462	David Ross	282
11	City Manager	Tacoma, WA	205,200	Elizabeth Pauli	2,100
12	City Manager	Treasure Island, FL	6,783	Garrison Brumback	99
13	City Manager	Winter Haven, FL	36,500	Michael Herr	486

2017 City / County Manager Searches Completed (continued)					
	Client	**Contact Name**	**Title**	**Phone**	**Email**
1	Auburn, AL	Bill Ham	Mayor	(334) 559-8804	bham@auburnalabama.org
2	Aventura, FL	Enid Weisman	Mayor	(305) 466-8900	eweisman@cityofaventura.com
3	Burien, WA	Lucy Krakowiak	Mayor	(206) 244-1952	lucyk@burienwa.gov
4	Carnation, WA	Jim Berger	Mayor	(425) 333-4192	jim.berger@carnationwa.gov
5	Doraville, GA	Donna Pittman	Mayor	(770) 451-8745	donna.pittman@doravillega.us
6	Fairborn, OH	Dan Kirkpatrick	Mayor	(937) 673-4178	dan.kirkpatrick@ci.fairborn.oh.us
7	Parkland, FL	Christine Hunschofsky	Mayor	(954) 993-3009	chunschofsky@cityofparkland.org
8	Petersburg, VA	Samuel Parham	Mayor	(804) 586-5528	sparham@petersburg-va.org
9	Roanoke, VA	Sherman Lea	Mayor	(540) 853-2444	sherman.lea@roanokeva.gov
10	Stuart, FL	Troy McDonald	Mayor	(772) 288-5300	TMcdonald@ci.stuart.fl.us
11	Tacoma, WA	Marilyn Strickland	Mayor	(253) 468-2518	marilyn.strickland@cityoftacoma.org
12	Treasure Island, FL	Robert “Bob” Minning	Mayor	(727) 415-8883	rminning@mytreasureisland.org
13	Winter Haven, FL	Steven Hunnicutt	Mayor	(863) 289-9971	smhunnicutt@mywinterhaven.com

2016 City / County Manager Searches Completed					
	Position	**Client**	**Population**	**Placement**	**Agency Size: Number of Employees**
1	City Manager	Cocoa Beach, FL	11,200	James McKnight	250
2	City Manager	Covington, VA	5,961	Richard Douglas	100
3	City Manager	Danville, VA	42,900	Ken Larking	1,100
4	Chief Administrator	El Paso, County, TX	827,700	Betsy Keller	480 under the Administrator
5	City Manager	Fort Myers, FL	70,918	Saeed Kazemi	944
6	City Administrator	Fort Smith, AR	87,350	Carl Geffkin	937
7	City Manager	Gainesville, FL	117,000	Anthony Lyons	1,300
8	City Manager	Mountlake Terrace	20,200	Scott Hugill	150
9	City Manager	Norwich, CT	40,500	John Salomone	430
10	City Manager	Orange City, FL	11,600	Dale Arrington	100
11	City Manager	Port St. Lucie, FL	178,590	Russ Blackburn	1,000
12	City Administrator	Prosser, WA	5,845	David Stockdale	50
13	City Manager	Savannah, GA	144,350	Roberto Hernandez	2,610
14	Township Manager	Springettsbury Township, PA	26,700	Benjamin Marchant	100

2016 City / County Manager Searches Completed (continued)					
	Client	**Contact Name**	**Title**	**Phone**	**Email**
1	Cocoa Beach, FL	Laurie Kalaghchy	City Clerk	(321) 868-3235	lkalaghchy@cityofcocoabeach.com
2	Covington, VA	Thomas Sibold	Mayor	(540) 958-8983	tomsibold@yahoo.com
3	Danville, VA	Sherman Saunders	Mayor	(434) 489-8738	sherman.saunders@danvilleva.gov
4	El Paso County, TX	Carlos Leon	Commissioner	(915) 546-2014	mmejia@epcounty.com
5	Fort Myers, FL	Randall Henderson	Mayor	(239) 321-7020	gpack@cityftmyers.com
6	Fort Smith, AR	Sandy Sanders	Mayor	(479) 784-2204	Mayor@fortsmithar.gov
7	Gainesville, FL	Todd Chase	Council Member	(352) 514-0168	chasetn@cityofgainesville.org
8	Mountlake Terrace, WA	Rick Ryan	Mayor Pro Tem	(206) 940-0108	RRyan@ci.mlt.wa.us
9	Norwich, CT	Deberey Hinchey	Mayor	(860) 823-3743	DHinchey@cityofnorwich.org
10	Orange City, FL	Tom Laputka	Mayor	(386) 775-5403	tlaputka@ourorangecity.com
11	Port St. Lucie, FL	Greg Orevac	Mayor	(772) 342-6072	mayor@cityofpsl.com
12	Prosser, WA	Randy Taylor	Mayor	(509) 875-4367	RTaylor@ci.prosser.wa.us
13	Savannah, GA	Eddie DeLoach	Mayor	(912) 210-1722	edeloach@savannahga.gov
14	Springettsbury Township, PA	Mark Swomley	Board Chair	(717) 805-3093	mark.swomley@springettsbury.com

2015 City / County Manager Searches Completed					
	Position	**Client**	**Population**	**Placement**	**Agency Size: Number of Employees**
1	City Manager	Cocoa Beach, FL	11,200	Ron McLemore	249
2	Village Manager	Estero, FL	23,100	Steve Sarkozy	6
3	City Manager	Fernandina Beach, FL	12,000	Dale Martin	268
4	County Manager(1)	Fulton County, GA	984,300	Richard Anderson	6,500
5	City Manager	Indianola, IA	14,800	Ryan Waller	92
6	City Manager	Mill Creek, WA	18,800	Rebecca Polizotto	62
7	City Manager	Normandy Park, WA	6,600	Mark Hoppen	27
8	City Manager	Ocala, FL	56,600	John Zobler	940
9	City Manager	Palm Bay, FL	105,000	Greg Lynk	748
10	City Manager	Seminole, FL	17,800	Ann Deal	159
11	City Manager	Sequim, WA	6,670	Charlie Bush	73
12	County Administrator	York County, VA	66,300	Neil Morgan	721

(1) Partial Search. We performed background checks for two candidates, coordinated the interviews and negotiated the employment contract. We did not search for candidates.

2015 City / County Manager Searches Completed (continued)					
	Client	**Contact Name**	**Title**	**Phone**	**Email**
1	Cocoa Beach, FL	Laurie Kalaghchy	City Clerk	(321) 868-3235	lkalaghchy@cityofcocoabeach.com
2	Estero, FL	Nick Batos	Mayor	(239) 292-2909	batos@estero-fl.gov
3	Fernandina Beach, FL	Ed Boner	Mayor	(904) 556-7554	eboner@fbfl.org
4	Fulton County, GA	Mark Massey	Clerk to the Commission	(404) 219-0451	Mark.Massey@fultoncountyga.gov
5	Indianola, IA	Kelly Shaw	Mayor	(515) 962-5300	lkshaw@cityofindianola.com
6	Mill Creek, WA	Pam Pruitt	Mayor	(425) 338-7158	ppruitt@cityofmillcreek.com
7	Normandy Park, WA	Susan West	Mayor	(206) 248-7603	Susan.West@ci.normandy-park.wa.us
8	Ocala, FL	Kent Guinn	Mayor	(352) 572-0312	kguinn@ocalafl.org
9	Palm Bay, FL	William Capote	Mayor	(321) 292-0382	Mayor@PalmBayFlorida.org
10	Seminole, FL	Leslie Waters	Mayor	(727) 430-7553	lwaters2@myseminole.com
11	Sequim, WA	Candace Pratt	Mayor	(360) 582-0114	cpratt@sequimwe.gov
12	York County, VA	Thomas Shepperd, Jr.	Chairman	(757) 868-8591	shepperd@yorkcounty.gov

2014 City / County Manager Searches Completed					
	Position	**Client**	**Population**	**Placement**	**Agency Size: Number of Employees**
1	County Manager	Alachua County, FL	251,400	Lee Niblock	855 under the Manager
2	City Manager	Bellevue, WA	132,000	Brad Miyake	1,229
3	City Manager	Connell, WA	4,200	Jed Crowther	19 + temp & seasonal
4	City Manager	Delray Beach, FL	64,100	Donald Cooper	800
5	Chief Administrator	El Paso County, TX	827,700	Stephen Norwood	480 under the Administrator
6	City Manager	Ellensburg, WA	18,300	Jack Akers	128
7	County Administrator[1]	Emmet County, MI	32,900	Marty Krupa	163
8	County Administrator	James City County, VA	67,000	Bryan Hill	750
9	City Manager	Marco Island, FL	13,300	Roger Hernstadt	210
10	City Manager	Mount Pleasant, MI	26,200	Nancy Ridley	119
11	City Manager	Mountlake Terrace, WA	20,200	Arlene Fisher	153
12	City Manager	North Miami, FL	60,600	Aleem Ghany	364
13	City Manager	Oakland Park, FL	42,800	David Hebert	240
14	Township Manager	Springettsbury Township, PA	26,700	Kristin Denne	100
15	County Administrator	St. Lucie County, FL	277,800	Howard Tipton	583 under the Administrator
16	City Manager	St. Pete Beach, FL	9,400	Wayne Saunders	88
17	Town Manager	Surfside, FL	6,000	Guillermo Omedillo	121
18	City Manager	Titusville, FL	43,900	Steve Larese	478
19	City Manager	Winchester, VA	26,900	Eden Freeman	560 under the Manager

[1] The actual title is County Controller but under Michigan Law, the duties are the same as those of a County Administrator.

2014 City / County Manager Searches Completed (continued)					
	Client	**Contact Name**	**Title**	**Phone**	**Email**
1	Alachua County, FL	Lee Pinkson	Commissioner	(352) 264-6900	lpinkoson@alachuacounty.us
2	Bellevue, WA	Kevin Wallace	Deputy Mayor	(425) 452-7810	KWallace@bellevuewa.gov
3	Connell, WA	Bruce Blackwell	Mayor	(509) 234-2701	bblackwell@connellwa.org
4	Delray Beach, FL	Cary Glickstein	Mayor	(561) 441-0222	glickstein@mydelraybeach.com
5	El Paso County, TX	Carlos Leon	Commissioner	(915) 546-2014	mmejia@epcounty.com
6	Ellensburg, WA	Rich Elliott	Mayor	(509) 962-7221	elliottr@ci.ellensburg.wa.us
7	Emmet County, MI	Jim Tamlin	Board Chair	(231) 622-2433	jtamlyn@emmetcounty.org
8	James City County, VA	Mary Jones	Board Chair	(757) 871-5977	mary.jones@jamescitycountyva.gov
9	Marco Island, FL	Larry Sacher	Councilor	(239) 588-0112	LSacher@marcocitycouncil.com
10	Mount Pleasant, MI	Kathleen Ling	Commissioner	(989) 773-7823	kling@mt-pleasant.org
11	Mountlake Terrace, WA	Rick Ryan	Mayor Pro Tem	(206) 940-0108	RRyan@ci.mlt.wa.us
12	North Miami, FL	Rene Monestine	City Attorney	(305) 895-9810	rmonestime@northmiamifl.gov
13	Oakland Park, FL	Shari McCartney	Mayor	(954) 295-0527	ShariM@oaklandparkfl.gov
14	Springettsbury Township,	George Dvoryak	Board Chair	(717) 683-4665	gdvoryak@Springettsbury.com
15	St. Lucie County, FL	Dan McIntyre	County Attorney	(772) 462-1420	mcintyred@stlucieco.org
16	St. Pete Beach, FL	Elaine Edmonds	Administrative Services Director	(727) 580-5178	elaine@stpetebeach.org
17	Surfside, FL	Daniel Dietch	Mayor	(305) 861-4863	ddietch@townofsurfsidefl.gov
18	Titusville, FL	Jim Tulley	Mayor	(321) 567-3702	Mayor@titusville.com
19	Winchester, VA	John Willingham	Council President	(540) 931-4655	John.Willingham@winchesterva.gov

2013 City / County Manager Searches Completed					
	Position	**Client**	**Population**	**Placement**	**Agency Size: Number of Employees**
1	City Manager	Ankeny, IA	45,000	David Jones	210
2	City Manager	Ashland, KY	21,000	Benjamin Bitters	300
3	Village Manager	Bal Harbour, FL	2,500	Jorge Gonzalez	37
4	County Manager	Clackamas County, OR	380,000	Donald Krupp	2,300
5	City Manager	Elmira, NY	29,000	Kim Middaugh	293
6	City Manager	Fruitland Park, FL	4,100	Gary La Venia	52
7	City Manager	Leesburg, FL	20,600	Alfred Minner	515
8	City Manager	Medina, WA	3,000	Michael Sauerwein	30
9	City Manager	Miramar, FL	122,000	Kathleen Woods-Richardson	960
10	City Manager	Monroe, NC	36,397	John D'Agostino	750
11	City Manager	Normandy Park, WA	6,300	Glenn Akramoff	27
12	County Manager	Okaloosa County, FL	170,000	Ernie Padgett	820
13	City Manager	Satellite Beach, FL	10,000	Courtney Barker	120
14	City Manager	Scottsdale, AZ	220,000	Fritz Behring	2,423
15	City Manager	Sunnyside, WA	15,000	Donald Day	95

2013 City / County Manager Searches Completed (continued)					
	Client	**Contact Name**	**Title**	**Phone**	**Email**
1	Ankeny, IA	Gary Lorenz	Mayor	(515) 371-2141	garyl@ljmd.com
2	Ashland, KY	Chuck Charles	Mayor	(606) 327-2001	ccharles@ashlandky.org
3	Bal Harbour, FL	Jaime Sanz	Council Member	(786) 427-4154	jsanz@balharbour.org
4	Clackamas County, OR	Paul Savas	Commissioner	(503) 655-8581	psavas@co.clackamas.or.us
5	Elmira, NY	Susan Skidmore	Mayor	(607) 738-3714	mayor@cityofelmira.net
6	Fruitland Park, FL	Chris Bell	Mayor	(352) 326-4291	cbell@fruitlandpark.org
7	Leesburg, FL	David Knowles	Mayor	(352) 326-9300	Allstate2@earthlink.net
8	Medina, WA	Michael Luis	Mayor	(425) 233-6400	mluis@medina-wa.gov
9	Miramar, FL	Yvette Colbourne	Commissioner	(954) 560-5161	ycolbourne@ci.miramar.fl.us
10	Monroe, NC	Lynn Keziah	Vice Mayor	(704) 221-2365	lkeziah@monroenc.org
11	Normandy Park, WA	Clarke C. Brant	Mayor	(206) 248-7603	clarke.brant@ci.normandy-park.wa.us
12	Okaloosa County, FL	Don Amunds	Commission Chair	(850) 585-8012	damunds@co.okaloosa.fl.us
13	Satellite Beach, FL	Frank Catino	Mayor	(321) 223-7700	fcatino@satellitebeach.org
14	Scottsdale, AZ	Suzanne Klapp	Vice Mayor	(480) 312-7402	sklapp@scottsdaleaz.gov
15	Sunnyside, WA	James Restucci	Mayor	(509) 643-4343	jrestucci@sunnyside-wa.gov

2012 City / County Manager Searches Completed					
	Position	**Client**	**Population**	**Placement**	**Agency Size: Number of Employees**
1	City Manager	Cape Coral, FL	154,300	John Szerlag	1,300
2	City Manager	Cocoa Beach, FL	11,200	Robert Majka	234
3	City Manager	Doraville, GA	8,500	Shawn Gillen	104
4	City Manager	Fayetteville, NC	208,000	Ted Voorhees	1,500
5	City Manager	Fort Pierce, FL	41,590	Robert Bradshaw	361
6	City Manager	Hallandale Beach, FL	37,100	Renee Crichton	449
7	County Administrator	Hernando County, FL	172,800	Leonard Sossamon	1,297
8	City Manager	Key West, FL	26,649	Bob Vitas	456
9	City Manager	Melbourne, FL	75,000	Michael McNees	927
10	Village Manager	North Palm Beach, FL	12,015	Ed Green	279
11	City Manager	Panama City Beach, FL	12,018	Mario Gisbert	250
12	City Manager	Sarasota, FL	51,917	Tom Barwin	599
13	City Manager	Sunrise, FL	4,260	Alan Cohen	1,203
14	City Manager	Yakima, WA [1]	91,000	Anthony O'Rourke	730
[1]	The manager's wife developed cancer after 3 months on the job and he resigned to be with her during treatment. We repeated the search at no cost even though it was outside the scope of our warranty.				

2012 City / County Manager Searches Completed (continued)					
	Client	**Contact Name**	**Title**	**Phone**	**Email**
1	Cape Coral, FL	John Carioscia	Council Member	239-242-3288	rerbrick@capecoral.net
2	Cocoa Beach, FL	Laurie Kalaghchy	City Clerk	(321) 868-3235	lkalaghchy@cityofcocoabeach.com
3	Doraville, GA	Donna Pittman	Mayor	(678) 328-9181	donna.pittman@Doravillega.us
4	Fayetteville, NC	Jim Arp	Mayor Pro Tem	(910) 728-2569	JArp@ci.fay.nc.us
5	Fort Pierce, FL	Anne Satterlee	Communications Manager	(772) 460-2200	asatterlee@city-ftpierce.com
6	Hallandale Beach, FL	Joy Cooper	Mayor	(954) 457-1318	jcooper@hallandalebeachfl.gov
7	Hernando County, FL	Ronald F. Pianta	Assistant County Administrator	352) 754-4002	RPianta@co.hernando.fl.us
8	Key West, FL	Shirley Freeman	Chair, Citizen's Advisory Committee	(305) 304-1975	shirleyfreemankeywest@gmail.com
9	Melbourne, FL	Paul Googleman	City Attorney	(321) 608-7200	cityattorney@melbourneflorida.org
10	North Palm Beach, FL	David Norris	Council Member	(561) 841-3355	dnorris@village-npb.org
11	Panama City Beach, FL	Gale Oberst	Mayor	(850) 235-1541	goberst@pcbgov.com
12	Sarasota, FL	Susanne Atwell	Commissioner	(941) 954-4115	Suzanne.Atwell@sarasotagov.com
13	Sunrise, FL	Kim Kisslan	City Attorney	(954) 746-3300	KKisslan@sunrisefl.gov
14	Yakima, WA	Micah Cawley	Mayor	(509) 901-9114	micah_cawley@ci.yakima.wa.us

2011 City / County Manager Searches Completed					
	Position	**Client**	**Population**	**Placement**	**Agency Size: Number of Employees**
1	City Manager	Albany, GA	76,000	James Taylor	863
2	City Manager	Chamblee, GA	17,000	Niles Ford	106
3	County Administrator	Clay County, FL	160,000	Stephanie Kopelousos	1,514
4	City Manager	Destin, FL	12,300	Mary Ann Ustick	65
5	Village Manager	Key Biscayne, FL	12,350	John Gilbert	115
6	City Manager	Madeira Beach, FL	4,260	Shane Crawford	71
7	Borough Manager	Matanuska-Susitna Borough,	88,000	John Mossey	275
8	City Manager	North Port, FL	55,800	Jonathan Lewis	569
9	City Manager	Orange Park, FL	9,100	Cindy Hall	110
10	Village Manager	Pinecrest, FL	19,400	Yocelyn Gomez	158
11	County Administrator	Polk County, IA	431,000	David Jones	1,300
12	City Manager	Portland, ME	65,000	Michael Rees	1,100
13	City Manager	Sunny Isles Beach, FL	17,000	Alan Cohen	178
14	City Manager	Tacoma, WA	198,400	T.C. Broadnax	3,872
15	City Manager	Yakima, WA	91,000	Don Cooper	730

2011 City / County Manager Searches Completed (continued)					
	Client	**Contact Name**	**Title**	**Phone**	**Email**
1	Albany, GA	Nathan Davis	City Attorney	(229) 431-2805	NDavis@albany.ga.us
2	Chamblee, GA	Marc Johnson	Interim Manager / Police Chief	(404) 819-9346	chiefmj@chambleepd.com
3	Clay County, FL	Travis Cummings	Former Commission Chair	(904) 376-5189	Not Available
4	Destin, FL	Chuck Garcia	Human Resources Director	(850) 837-4242	cgarcia@cityofdestin.com
5	Key Biscayne, FL	Conchita Alvarez	Village Clerk	(305) 365-5506	calvarez@keybiscayne.fl.us
6	Madeira Beach, FL	Travis Palladeno	Mayor	(727) 239-5549	tpalladeno@madeirabeachfl.gov
7	Matanuska-Susitna, AK	Sonya Conant	Human Resources Director	(907) 746-7432	Sonya.Conant@matsugov.us
8	North Port, FL	Jim Blucher	Vice Mayor	(941) 628-2916	jblucher@cityofnorthport.com
9	Orange Park, FL	Sarah Campbell	Town Clerk	(904) 278-3018	scampbell@townop.com
10	Pinecrest, FL	Guido Inguazo	Village Clerk	(305) 234-2121	inguanzo@pinecrest-fl.gov
11	Polk County, IA	E.J. Giovannati	Former County Supervisor	(515) 371-0782	EJGiovannetti@hhlawpc.com
12	Portland, ME	Cheryl Leeman	Search Chair / Council Member	(207) 774-4308	cl@portlandmaine.gov
13	Sunny Isles Beach, FL	Norman Edelcup	Mayor	(305) 792-1701	NSEdelcup@aol.com
14	Tacoma, WA	Joy St. Germain	Human Resources Director	(253) 591-2060	jstgermain@ci.tacoma.wa.us
15	Yakima, WA	Micah Cawley	Mayor	(509) 901-9114	micah_cawley@ci.yakima.wa.us

II. Proposed Work Plan

The following search methodology has been refined over the past twenty years and now is virtually foolproof. We will integrate your ideas into the process. Our goal is to ensure you have the right people to interview as well as the information you need to make the right decision.

Phase I: Information Gathering and Needs Assessment

Task One: Needs Assessment

An important part of the recruiter's work is selling the community to the very best candidates (including those that are not actively looking for the next job) while also providing an accurate portrayal of the community and the opportunity. In order to do this, CB&A must first determine the needs of the client and the characteristics of the ideal candidate. Our approach is as follows:

- Compile background information from the jurisdiction's website and other sources.
- Interview the relevant parties. Depending on the position, these might include the City Council, City Manager, Department Heads, and/or stakeholders (such as community groups, business owners, residents, government officials and property owners). Our goal is to develop a strong sense of your organization, its leadership, its short and long term expectations, and its challenges;
- Determine the characteristics of the ideal candidate. These will likely include experience, longevity, education, personality, demeanor, and achievements as well as other items the Council Members and stakeholders consider important), and
- Determine a reasonable compensation package.

Our searches generally take 60 to 90 days. At this point in the process, we will also finalize the timeline with the City so candidates can mark their calendars well in advance and will be available when the City wishes to conduct the interviews.

As noted above, we routinely incorporate meetings with other stakeholders (such as the business community, the non-profit community, City staff and so on) to gather their insights. We can also solicit the input of your residents through an on-line survey. These forums and surveys are valuable as they provide additional perspectives and a better understanding of the environment and the wants/needs of the community that the employee will be working in. An example of an online survey is included as Appendix D.

Task Two: Develop Position Description and Recruitment Materials

Based on the information we gather, CB&A will next develop a comprehensive recruitment profile. We will provide our draft for your review and comment. We will then meet with the Council Members to discuss the results of our interviews and the resulting recruitment profile. Your suggestions will be incorporated, and the final document prepared. A sample of our work is included as Appendix B. Other samples can be found on our firm's website under the "Executive Recruitments" / "Active Recruitments" tabs.

II. Proposed Work Plan

Phase II: Recruitment

Task Three: Recruit Candidates

CB&A uses a number of approaches to identify the right people for this position. We say people, and not person, because our goal is to bring you six to ten excellent semi-finalists, all of whom will do the job extraordinarily well and who are so good you will have a difficult time choosing among them. You then select the top three to five people to interview and ultimately choose the candidate who is the best fit with you and your community. The approaches we use are:

- ***Networking:*** The best approach is diligent outreach. We will network with our colleagues and consult our data base. As we identify outstanding candidates (many of whom are not in the market), we will approach them and request that they apply. Often excellent candidates are reluctant to respond to advertisements because doing so may alienate their current employers. When we approach them, their credentials are enhanced rather than diminished. We also use LinkedIn as a source of candidates.
- ***Advertising*** While we will seek out the best, we will not ignore the trade press as it often also yields strong candidates. We would contact the members of organizations such as the International City/County Management Association, South Carolina City/County Management Association, etc. for the City Administrator Search and the National Association of Chiefs of Police, South Carolina Police Chiefs, etc. for the Police Chief search. We will also post it on our website, ***www.cb-asso.com***. We generally do not use newspapers or generic websites because while they produce large numbers of applications, they generally do not produce the type of candidates our clients are seeking. If the City wants to have ads placed in local newspapers, national newspapers and/or generic websites, it will need to bear the cost.
- ***Email:*** We will also e-mail the recruitment profile to our listserv of over thirteen thousand managers and professionals who are interested in local government management. One of the advantages of e-mail is that if the recipient is not interested, he/she can easily forward the recruitment profile to someone else who may be interested.

Phase III: Screening and Finalist Selection

Task Four: Evaluate the Candidates

Based on our most recent recruiting efforts, we anticipate receiving resumes from sixty to one hundred applicants. We will narrow the field as described above and present information on candidates to the Council. This process requires a mixture of in-depth research and subjective evaluation. Our process is as follows.

It should be noted that selecting strong candidates is more an art than a science. While we consider standard ranking factors and the elements of the job, ultimately the most important factor is who we believe will be a good fit with the City and the community. Typically, forty percent of our finalists are women and/or minorities.

II. Proposed Work Plan

Specifically, our efforts will involve:

Step One. Resume Review. CB&A will evaluate all resumes and identify the eight to fifteen high quality candidates.

Step Two. Screening Interview. Our lead recruiter, and possibly other senior representatives of the firm, will interview each of these candidates. Using what we learned in Phase I and our experience as managers and recruiters, as well as our unique ability to assess candidates, we will determine whether or not to consider them further.

Step Three. Prepare a Report. We will prepare a written report summarizing the Results of the Recruitment and the top seven to ten candidates. We will forward our report to the Council.

Step Four. Evaluate the Best Candidates. We will develop materials and background investigations for the to five to six candidates. For those that remain in consideration, CB&A will:

- **Ask the Candidates to Prepare a Written Introduction:** We will ask the candidates to prepare a written introduction to themselves as part of their preliminary background checks. This is done for several reasons. First, it allows the candidates to tell their own story and balance the negativity that is so often characteristic of the press. It also allows the City to evaluate the candidates written and communicative skills.

- **Candidate Disclosure Statement:** We will ask candidates if there is anything controversial in their background that we should be made aware of prior to further consideration. While it is unlikely that we find anything not previously publicized in the press, we believe redundant checks offer superior security for our client.

- **Interviews of References:** We tell the candidate with whom we wish to speak. These include current and former Council Members, the municipal attorney, the external auditor, staff members, peers, news media representatives, the director of the local chamber of commerce, community activists, and others who know the candidate. We also attempt to contact some individuals who are not on the candidate's list. Typically, we reach eight to ten people and prepare a written summary of each conversation.

- **Legal Checks:** Through our third party vendor, American DataBank, we will conduct the following checks: criminal records at the county, state and national level; civil records for any litigation at the county and federal level; and bankruptcy and credit.

  Search the Internet and Newspaper Archives: Virtually every local newspaper has an archive that provides stories about perspective candidates, the issues they have dealt with, how they resolved them and the results. These articles can also provide valuable insights into the candidate's relationship with the public and the governing body. Of course, not all news sources are unbiased, and we consider that in our evaluation. This step is conducted in order to quickly discover candidates with problems in their backgrounds and eliminate them.

- **Verification of Education:** We also verify claimed educational degrees to assure the candidate is being totally forthright.

- **Verification of Work History:** We verify employment for the past fifteen years.

The goal in conducting these checks is to develop a clear picture of the candidates and to determine which best meet the criteria established in Phase I. Each of the avenues we pursue adds a piece of the puzzle. We will crosscheck sources, search for discrepancies, and resolve them when we find them. When sensitive or potentially embarrassing items are discovered, they are thoroughly researched. If we conclude the situation is damaging or even questionable, the situation reported to the City, with the City's concurrence, the candidate will be dropped from further consideration.

> *Note: We firmly believe that all background work we have outlined above should be completed early in the process. That way the client knows the individuals to be interviewed are all top performers and do not have anything embarrassing in their pasts that might come to light after selection. It also means that once our client has made a selection, it can move forward promptly, negotiate a contract and make an announcement.*

Task Five: Preparation and Presentation of Candidate Materials

For the selected candidates, CB&A will compile the information we have developed into a complete written report for each recommended candidate. Specifically, this information will include: the candidates' resumes, introductions, references, background checks and internet / newspaper archive search results. A complete sample candidate report is included as Appendix C. We will also provide some advice on interviewing, a series of questions the elected officials may wish to ask (as well as some areas that it is not wise to get into), and some logistical information. The preceding information will be forwarded to you *electronically*.

Task Six: Finalist Selection

Approximately a week after the City has received the candidate materials, CB&A will meet with the elected officials to discuss our findings and make a final determination concerning who will be invited to interview. The City will then select four to six candidates to interview.

Task Seven: Notify All Candidates of Their Status

We will notify the finalists by telephone and give them the opportunity to ask additional questions. We will also provide them with information concerning the interviews and travel if necessary.

CB&A will inform those not selected of their status. Part of the notification will include advice concerning the candidates' resume and/or cover letter so, even though they were not selected to go forward, they will have gained something valuable from participating in the process.

Phase IV: Coordinate the Interview Process and Selection

Task Eight: Coordinate the Candidate Assessment Process

Prior to the interviews, we will recommend an interview/assessment process for the City's review including means to evaluate the candidates' communication skills, interpersonal skills, and decision-making skills. As part of the process, we will recommend the City observe the finalists in a number of settings. We will also recommend you invite the finalists' spouses so they can spend time in and evaluate your community.

> **Day #1:** The finalists are given a tour of the community and its facilities by a knowledgeable staff member. Later, senior staff members meet briefly with the candidates. This opportunity allows the finalists to ask questions and the City to assess the candidates in a social setting.
>
> **Day #2:** Beginning at approximately 9:00 a.m., each candidate interviews individually with panels representing different aspects of the government and the community for approximately 50 minutes each. These meetings provide the City with an opportunity to assess how the candidates might interact with them. We also anticipate the candidate interviewing one-on-one with the person(s) who will be supervising them as well as one or more panels.

Task Nine: Debriefing and Selection

Once the interviews have concluded, CB&A suggests the City consider making a selection. If questions exist, we will be happy to answer them or conduct additional research as necessary.

Once the selection has been made, CB&A will notify the finalists of their status. Candidates are eager to know and we feel it is important to keep them informed.

Phase V: Negotiation and Continuing Assistance

Task Ten: Notification, Contract Negotiations and Warranty

We will then assist in the employment agreement negotiations. Generally, a member of the elected body and the attorney conduct the actual negotiations while we provide advice and assistance concerning the compensation package and contract. We can also take the lead role in the negotiations if desired. We have a standard contract you are welcome to use. Your attorney, of course, will prepare the final contract. Since the basic parameters will have been discussed with the candidates and the candidates have been thoroughly vetted, we expect a relatively prompt agreement.

Task Eleven: Continuing Assistance

Our work is not done when the contract is executed. We will stay in touch with you and your new City Administrator and Police Chief. Our goal is to be there to assist in resolving any issues that arise before

they become intractable. In fact, at your request, we will conduct a team-building workshop, at no charge, to resolve any difficulties. We simply feel it is part of our job to assure a successful relationship.

Communications: We will provide weekly reports about the status of the search, in writing or by phone, depending upon your preference. At significant milestones we will make the reports in person. We are also available at any time, day or night, to address any questions you have along the way. To do so, we will provide you with our cellphone numbers and you should feel comfortable contacting us whenever you have a question whether it is directly related to the search or, for that matter, anything else related to local government. We want to be responsive and to assist in any way we can.

The City's Obligations

The City will be responsible for providing the facilities for the interview process, coordinating lodging for candidates from outside the area, and making arrangements for the reception. The City will also be responsible for reimbursing the candidates for all expenses associated with their travel, meals, and incidentals for the interview weekend.

The City should also plan to provide the following information, if it is not available on the City's website, to each of the finalists: the current year budget, an organizational chart, the latest completed audit and management letter, any current strategic and long range plans, a copy of the City Charter, any job descriptions and other materials defining the role and duties for the position, and any evaluations of the organization completed in the last year.

These are the only obligations and responsibilities the City is expected to assume in the recruitment process.

Project Schedule

The following is the project schedule we suggest for this recruitment and one we could use for this recruitment. We realize the schedule may need to be adjusted to accommodate the Council Members' availability.

We will begin with the City Administrator search and then start the Police Chief search about a month later so that the new City Administrator can participate in the hiring process of the Police Chief.

Phase I: Needs Assessment / Information Gathering

May 23rd:	CB&A begins meeting with the Council Members and, if suggested, other stake holders to understand the job and its challenges.
May 29th:	CB&A submits the draft of the full recruitment profile to the City for its review. Comments will be due back on June 5th.

Phase II: Recruiting

June 8th:	CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to over 13,400 local government professionals.
June 29th:	Closing date for submission of applications.
July 6th:	CB&A reports on the results of the recruitment.

Phase III: Screening, Reference Checks and Credential Verification

July 30th:	CB&A forwards its reports and materials to the City for the recommended candidates. These will include the candidates' resumes and introduction as well as the results of our reference, background and Internet/newspaper archives checks.
August 6th:	City selects / confirms the finalists for interviews.

Phase IV: Interview Process Coordination and Selection

August 16th:	City holds reception for the finalists.
August 17th:	One-on-one and full Council interviews and decision.

Phase V: Negotiation, Warranty & Continuing Assistance

Post-Selection:	CB&A works with City representatives and the selected candidate on an employment agreement.

Some of CB&A Clients…

City of Albany, GA

City Manager

City of Chamblee, GA

City Manager

City of Doraville, GA

City Manager

City of Savannah, GA

City Manager
Revenue Operations Director

III. Proposed Project Staff

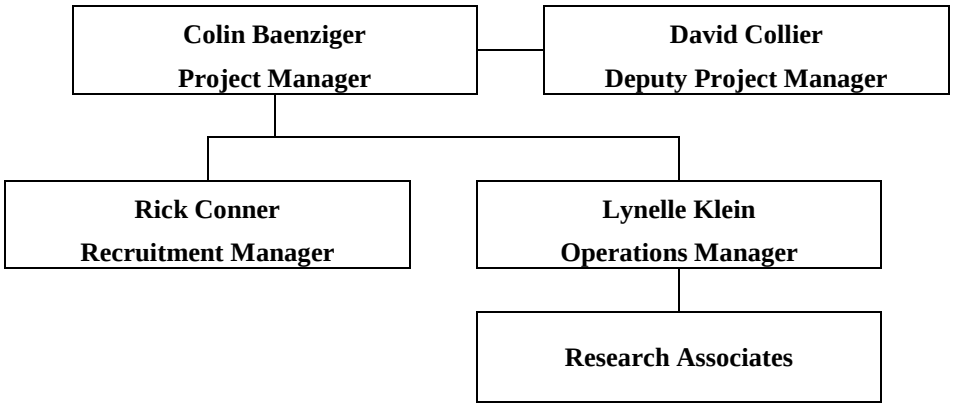
Project Team and Involvement

Colin Baenziger & Associates is an experienced recruiting firm which strongly believes that the majority of the search work should be conducted by one knowledgeable person. Colin Baenziger will be that person—he will serve as your project manager. He will conduct the interviews with the elected officials, search for strong candidates, discuss the position with those candidates, recruit them, conduct the interviews with the candidates, conduct the background investigations, oversee the interview process, and assist with the contract negotiations. In addition to twenty years as a consultant, Mr. Baenziger spent ten years in government as a senior manager. Overall, he has been the firm's Project Manager for more than one hundred and twenty-five city and county manager searches. Prior to starting CB&A, he spent over 20 years hiring key staff.

David Collier, senior vice president, will be the Deputy Project Manager and support for Mr. Baenziger. Mr. Andrews will assist in virtually every aspect of the search effort but will focus on the search for strong candidates and candidate evaluation. Before joining CB&A as a recruiting in 2006, he had over 30 years of experience as a senior level local government manager in several states and in that capacity hired many key staff. He earned his Bachelor of Arts degree in economics and his Master's degree in public administration from the American University in Washington, D.C. He is a past president of the Maryland City Managers Association and the Florida Association of County Administrators.

Rick Conner, vice president, will serve as the recruitment manager and assist with the identification and screening of candidates. He has over 30 years of in local government and in executive recruiting. He earned Bachelors of Science Degrees in Business Administration and Engineering from the University of Missouri.

Lynelle Klein, vice president for operations, will be responsible for coordinating the advertising and production of the materials we will present to you as described in the Recruitment Approach.



Colin Baenziger, M.P.A.

Principal

Colin Baenziger is a student of local government and responsible for the executive recruitment functions at Colin Baenziger & Associates. Over the years, he has worked with a number of cities on recruitments and on management, operational, and organizational issues. As a former manager and someone who actively consults with governments, he understands what it takes to do the manager's job effectively. Furthermore, because he is active in a number of professional associations, he knows many of the nation's managers on a first-name basis.

Some of Mr. Baenziger's searches for local governments include:

- City Manager, Coral Gables, FL (population 42,000)
- City Manager, Cottonwood Heights, UT (population 34,000)
- City Manager, Fife, WA (population 8,200)
- City Manager, Fayetteville, NC (population 208,000)
- Village Manager, Key Biscayne, FL (population 11,000)
- Economic Development Director, Loudoun County, VA (population 326,000)
- Community Development Director, Miami, FL (population 373,000)
- Borough Manager, Matanuska-Susitna Borough, Alaska (population 88,000)
- City Manager, Mount Dora, FL (population 12,000)
- County Manager, Clackamas County, OR (population 380,000)
- City Manager, Palm Coast, FL (population 51,000)
- City Manager, Portland, ME (population 65,000)
- City Manager, Roanoke, VA (population 96,000)
- City Manager, Tacoma, WA (population 200,000)
- General Manager, Tampa Bay Water Authority (serving a population of 2.4 million)
- County Manager, Union County, NC (population 290,000)

Other recent efforts include a strategic planning session for the Florida Association of Special Districts, an operational review of Tamarac's water utility, a business practices review for a division of Martin County government, an operational reconciliation for Palm Beach County Water, development of an automated system to pay royalties to featured recording artists for the Recording Industry Association of America, and a review of financial procedures for a division of the Marriott Corporation.

Mr. Baenziger has a master's degree with distinction in public administration from Cornell University's Graduate School of Management, and a Bachelor of Arts degree from Carleton College. He is also active in the International City Management Association and the Florida City and County Management Association. He has also been called upon frequently to speak at conferences of the Utah and Florida City/County Managers' Associations, and the Florida Public Personnel Association.

Dave Collier, M.P.A.

Senior Vice President

Before joining CB&A in 2006, Dave Collier spent over 30 years of management experience in county and city government. Since there is not much that he has not seen previously, Dave quickly produces efficient and effective solutions to problems for his clients.

One of Dave's specialties is executive search. With his many years of experience, he can quickly separate the wheat from the chaff and find the right person to join your senior staff or be your department head. He also has successfully conducted organizational reviews, sessions in team building and strategic planning workshops. Just as importantly in this day and age of the pressure to lower taxes, he has developed strategies and action plans for coping with the tough financial problems that local government often experience.

Dave has overseen the recruitment and selection of:

- County Manager, Brevard County, FL,
- City Manager, Coral Gables, FL,
- City Manager, Cape Canaveral, FL,
- City Manager, Dania Beach, FL,
- City Manager, North Miami, FL,
- City Manager, Orange City, FL,
- City Manager, West Melbourne, FL,
- City Administrator, West Park, FL,
- Finance Director for Tamarac, FL, and
- Environmental Resources Director for St. Lucie County, FL.

While serving as City Manager of Stuart, Florida for 14 years, he improved the professionalism of City Department Heads and staff through an emphasis on professional development and team building. He also used his hands-on management style to emphasis the need for effective project management and maintaining tight timelines in order to show citizens that the city government was effectively managed and had a strong commitment to its customers. Prior serving in Stuart, Dave was a County Manager in Florida, Kansas and Michigan. He also has extensive experience in local government consulting.

Mr. Collier earned his Bachelor of Arts degree in Economics and his Master's degree in Public Administration from the American University in Washington, D.C. He was a member of the International City/ County Management for over thirty years, served as President of the Maryland City Managers Association and the Florida Association of County Administrators. Mr. Collier is involved in his community as a member of the City of Stuart's CRA Advisory Board and as a Director of Stuart's Main Street Association.

Rick Conner, P.E.

Vice President

Rick Conner is a recent addition to CB&A's strong cadre of municipal operations experts. With over 30 years of management experience in local government, he has seen it all and done most of it. He possesses keen analytical skills and the ability to slice through critical issues. As a result, he is another outstanding weapon in the firm's arsenal of experts. His years in local government and his many licenses and certifications help him to judge talent quickly and effectively.

In addition to his experience as a City Manager, Rick's previous positions such as a Public Works Director, gives him an excellent perspective of the needs of local government operations and staffing.

Prior to joining Colin Baenziger & Associates in 2012, some of the top leadership positions that Rick has held include:

- City Manager of Sunny Isles Beach, Florida,
- City Manager of Portland, Texas,
- City Manager of Marble Falls, Texas,
- Public Works Director of Nashville/Davidson County, Tennessee, and
- Public Works Director of Bryan, Texas

While serving in these positions, Rick received national recognition for his Customer Service programs. Over his career, Mr. Conner has been involved in a variety of recruitments. Some of these include:

- City Manager, Fayetteville, NC,
- City Manager, Sarasota, FL,
- City Manager, Cocoa Beach, FL
- Chief Executive Officer/General Manager, Des Moines (IA) Water Works,
- Finance Director/Procurement Officer for a bedroom community to Corpus Christie, TX,
- Accounting Director for a medium size West Texas city
- Police Chief for a Florida barrier island community,
- Water and Wastewater Director for a medium size, central Texas city,
- Airport Fixed Base Operator for a Texas university community, and
- Airport Manager for a medium size Texas university city.

Rick holds a Bachelor of Science in Business Administration and a Bachelor of Science in Civil Engineering from University of Missouri. He also worked towards Masters Degrees in both Math and Civil Engineering before joining the work force. He is a Registered Land Surveyor and a Professional Engineer in Missouri, as well as a Professional Engineer in Florida, Tennessee and Texas.

Lynelle Klein

Vice President for Operations

Ms. Klein is a skilled professional with a wealth of public and private sector experience. Her particular expertise is in special projects, compensation surveys, and background checks for our executive search candidates. She feels that each client must be properly served, and that can only be done by devoting her utmost attention to their particular concerns and by finding creative ways to solve their problems. In her book, the client comes first.

Since beginning her working relationship with Colin Baenziger & Associates in 2010, Ms. Klein has been involved in virtually every executive search the firm has conducted.

Some of the more notable searches in which she has played a key role include**:**

- City Manager, Delray Beach, FL (64,100)
- City Manager, Doraville, GA (population 8,500)
- City Manager, Indianola, IA (population 14,800)
- Police Chief, Farmington, NM (population 45,000)
- City Manager, Leesburg, FL (population 21,000)
- City Manager, Mill Creek. WA (population 18,800)
- City Manager, Miramar, FL (population 122,000)
- City Manager, Norwich, CT (population 40,300)
- City Manager, Seminole, FL (17,800)
- City Manager and Finance Director Sunnyside, WA (population 16,000)
- City Manager, Winchester, VA (population 16,000)
- County Manager, Alachua County, FL (population 253,500)
- County Administrator, Clackamas County, OR (population 383,900)
- County Administrator, James City County, VA (population 70,500)
- County Manager, St. Lucie County, FL (population 283,900)
- County Administrator, York County, VA (population 66,300)
- County Attorney, Fulton County, GA (population 992,000)
- Director, Growth Management, Collier County, FL (population 340,000)
- Solid Waste Director City of Tampa, FL (population 347,000)

Ms. Klein's prior employment was primarily in the private sector. For over 15 years she provided contract financial and administrative services to companies who did not require full time office staff. Some of her clientele included TLC Cabulance, Clear and Clean Pool Service, Elizabeth Fountain Interiors, a published author and a landscaping company. Ms. Klein has an Associate's Degree from Brigham Young University.

More CB&A Clients…

City of Alachua, FL

City Manager

City of Covington, VA

City Manager

City of Orange Park, FL

City Manager

City of Sequim, WA

City Manager

IV. Fee and Warranty

Fee

CB&A offers a firm, fixed fee ***which includes all our expenses and costs.*** In other words, the only thing the City will pay CB&A is the agreed upon fee. The only other costs the City will be responsible for are the costs associated with the candidates' (and spouses, if invited) travel, accommodations and meals for the interview process. The advantage to the City is it knows exactly what it will pay. The advantage to CB&A is that we do not have keep track of every minor expense.

We will bill the fee as the phases are completed and according to the following schedule:

City Administrator Search	
Phase I: Needs Analysis / Information Gathering	$ 3,000
Phase II: Recruiting	11,000
Phase III: Screening	10,000
Phase IV: Interview Process Coordination and Selection	1,500
Phase V: Negotiation and Continuing Assistance	1,000
Firm, Fixed Fee Total	$26,500

The Police Chief Search, and any other succeeding search, will be $24,000 under the assumption that most of the work in Phase I will not need to be repeated.

Police Chief Search / Any Other Searches	
Phase I: Needs Assessment / Information Gathering	$ 500
Other Phases will be billed as above	
Firm, Fixed Fee Total	$24,000

If the City asks us to perform work that is clearly beyond the scope of this proposal, it will be billed at a rate of $150 per hour. No such work will be performed without your written authorization. Please note, as previously stated, that we have neither billed nor requested additional funds beyond our originally quoted fee even when we have been entitled to it.

IV. Fee and Warranty

Warranty

Colin Baenziger & Associates offers the best warranty in the industry. We can offer it because we have confidence in our work. Provided the City instructs us with conducting a full search (Phases I-V) and assuming it selects from among the candidates we recommend, we warrant the following:

1) We will not approach the selected candidate for any other position as long as the individual is employed by the City.
2) If the selected individual leaves for any reason other than an Act of God (such as total incapacitation or death) within the first year, CB&A will repeat the search for the reimbursement of our expenses only.
3) If you are not satisfied with the candidates we present, CB&A will repeat the search until you are satisfied.
4) Our price is guaranteed and will not be exceeded for any reason, even if conditions change after the contract is executed.

V. References

City Manager, Doraville, GA (population 8,500)

Contact: Mayor Donna Pittman at (678) 328-9181, or
Donna.Pittman@Doravillega.us

Doraville changed its charter in 2012 to become a city manager form of government. Although contracted to do just the **City Manager** search, we also assisted the City in preparing the implementing ordinances. Our work included scouring the nation to find the right person for the position, interviewing the candidates, conducting through background checks, and recommending finalists for the city to interview. *Mr. Shawn Gillen, City Administrator for Grand Rapids, MN,* was selected on January 14, 2013.

City Manager, Fernandina Beach, FL (population 12,000)

Contact: Commissioner John Miller at (904) 556-3209, or
jmiller@fbfl.org, or
Commissioner Robin Lentz at (904) 206-0122, or
rlentz@fbfl.org
Commissioner Tim Poynter at (904) 415-6533, or
tpoynter@fbfl.org

CB&A was hired in late June 2015 to find the City's next **City Manager.** Our work included searching the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, and recommending finalists for the City to interview. The City selected *Dale Martin, formerly City Manager of Winchester, CT,* on September 23, 2015. Mr. Martin remains with the City.

City Manager, Satellite Beach, FL (population 10,100)

Contact: Mayor Frank Catino at (321) 223-7700, or
fcatino@satellitebeach.org

Satellite Beach retained CB&A just after Christmas, 2012 to help find its next **City Manager**. We began work immediately by meeting with the Council Members and based on what we learned, we crafted a recruitment profile. We searched the country for outstanding candidates. Background checks were thorough and four finalists were selected. Interviews were held on March 15th and 16th and *Courtney Barker, formerly Executive Director of the Planning and Growth Management Department for Titusville, FL,* was selected on the March 21st. Ms. Barker remains with the City.

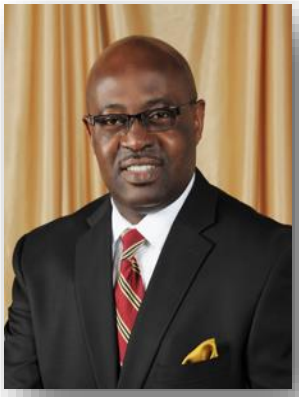
City Manager Recruitment, City of Treasure Island, FL (population 6,783)

Contact: Mayor Bob Minning at (727) 415-8863, or
rminning@mytreasureisland.org

CB&A began work on August 24, 2017, to assist the city in finding its next **Manager**. Our work included scouring the nation to find the right person for the job, interviewing the candidates, conducting through background checks, recommending finalists for the city to interview and helping with the contract negotiations. It was a particularly interesting recruitment because an affirmative vote of four of the five commission members was required and one of the commission members refused to participate. Thus, the selection had to be "unanimous". Garrison "Garry" Brumback, *formerly City Manager of Southington, CT, and earlier an Assistant City Manager in Clearwater, FL,* was selected on November 3, 2017.

City Manager, City of West Park, FL (population 13,700)

Contact: Former Mayor Eric Jones at (954) 410-8139



West Park is a relatively new city in Broward County, FL. CB&A began meeting with the City's elected officials on January 13, 2010 to find its next **City Administrator**. It was critical to the Council that the finalists all understand the character of the community and be able to function well in an urban environment. The City also wanted a panel of local City Managers to review the finalists and to make recommendations concerning CB&A's finalists (which elongated the process slightly). Interviews were conducted on April 16th and 17th with *Ajibola Balogun, formerly the City Manager of South Miami* being selected on April 21st 2010. Mr. Balogun remains with the City.

Candidate References

While it is important to deliver what the City expects, it is also important to keep candidates informed and to treat them with respect and dignity. Accordingly, we have provided references from three of those candidates.

Placement	Formerly	Recruited To Be	Contact at
Dale Martin	City Manager Winchester, CT	City Manager Appointed September, 2015	(904) 557-5047 **dmartin@fbfl.org**
Eden Freeman	Assistant City Manager Sandy Springs, GA	City Manager Winchester, VA Appointed June, 2014	(540) 667-1815 **citymanager@ winchesterva.gov**
Bryan Hill	Deputy County Administrator Beaufort County, SC	County Administrator James City County, VA Appointed July 2014 In 2018, he was appointed as the County Executive for Fairfax County, VA	(703) 324-2531

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

PROPOSAL TO PROVIDE EXECUTIVE SEARCH SERVICES FOR CITY ADMINISTRATOR AND POLICE CHIEF FOR ISLE OF PALMS, SC

Volume II: Appendices

Colin Baenziger & Associates

Project Manager and Contact Person:

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…Serving Our Clients with a Personal Touch…

PROPOSAL TO BE THE CITY'S EXECUTIVE RECRUITING FIRM

VOLUME II: APPENDICES

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Appendix A

Searches by
Colin Baenziger & Associate' Staff

Governmental Search Assignments

Performed by the Staff of Colin Baenziger & Associates

Current Searches

City Manager, Naples, FL (population 21,800)
Township Manager, Spring Garden Township, FL (population 12,963)

Clerk to the County Commission, Fulton County, GA (population 1.02 million)
Economic Development Director, Roanoke, VA (population 98,465)
Executive Director, South Correctional Entity (SCORE), Des Moines, WA (population served 406,000)
Finance Director, Groveland, FL (population 12,493)

Completed Searches in 2018

City Manager, Groveland, FL (population 12,493)
City Administrator, Lake Forest Park, WA (population 13,059)
Town Manager, North Topsail Beach, NC (population 734)
City Manager, Sebastian, FL (population 24,772)

Chief Labor Negotiator, Orlando, FL (population 270,934)
Fire Chief, St. Lucie County Fire District, FL (population 298,600)
Parks and Recreation Director, Cape Coral, FL (population 179,804)

Governmental Search Assignments (continued)

Completed Searches Prior to 2018

City/Town/Village Manager/Administrator

City Manager, Alachua, FL (population 6,200) in 2001
City Manager, Albany, GA (population 75,600) in 2011
City Manager, Ankeny, IA (population 45,600) in 2013
City Manager, Ashland, KY (population 21,000) in 2013
City Manager, Auburn, AL (population 58,582) in 2017
City Manager, Aventura, FL (population 37,724) in 2017
Village Manager, Bal Harbour, FL (population 3,300) in 2013
City Manager, Bartow, FL (population 16,000) in 2007 in 2017
Town Manager, Bay Harbor Islands, FL (population 5,200) in 2003 and 2007
City Manager, Bellevue, WA (population 122,400) in 2014
Town Manager, Buckeye, AZ (population 32,000) in 2006
City Manager, Burien, WA (population 55,188) in 2017
City Manager, Cape Canaveral, FL (population 10,200) in 2010
City Manager, Cape Coral, FL (population 154,300) in 2012
City Manager, Carnation, WA (population 1,873) in 2017
City Manager, Casselberry, FL (population 25,000), in 2005
City Manager, Chamblee, GA (population 17,000) in 2011
City Manager, Cocoa Beach, FL (population 11,200) in 2012, 2015 and 2016
City Administrator, Connell, WA (population 4,200) in 2014
City Manager, Cooper City, FL (population 32,000) in 2008
City Manager, Coral Gables. FL (population 43,000) in 2009
City Manager, Cottonwood Heights, UT (population 34,000) in 2004
City Manager, Covington, VA (population 5,802) in 2016
Town Manager, Cutler Bay, FL (population 35,000) in 2006
City Manager, Dania Beach, FL (population 28,000) in 2009
City Manager, Danville, VA (population 43,000) in 2016
City Manager, Daytona Beach, FL (population 65,000) in 2002
City Manager, Delray Beach, FL (population 64,100) in 2014
City Manager, Deltona, FL (population 83,000) in 2006 and 2008
City Manager, Destin, FL (population 12,000) in 2003 and 2011
City Manager, Doral, FL (population 24,000), in 2004
City Manager, Doraville, GA (population 10,896) in 2013 and 2017
Town Manager, Dundee, FL (population 3,000) in 2006 and 2009
City Manager, Ellensburg, WA (population 18,350) in 2014
City Manager, Elmira, NY (population 29,200) in 2014
Village Manager, Estero, FL (population 26,600) in 2015
City Manager, Fairborn, OH (population 33,200) in 2017
City Manager, Fayetteville, NC (population 208,000) in 2012
City Manager, Fernandina Beach, FL (population 11,000) in 2006 and 2015
City Manager, Fife, WA (population 8,700) in 2010 in 2017
City Manager, Fort Myers, FL (population 68,190) in 2016

City/Town/Village Manager/Administrator (continued)

Town Manager, Fort Myers Beach, FL (population 6,900) in 2006 and 2008
City Manager, Fort Pierce, FL (population 41,900) in 2012
City Manager, Fort Smith, AR (population 87,650) in 2016
City Manager, Fruitland Park, FL (population 4,100) in 2013
Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1999 and 2005
City Manager, Gainesville, FL (population 117,000) in 2016
City Manager, Greensboro, NC (population 259,000) in 2009
City Manager, Hallandale Beach, FL (population 39,000) in 2010 and 2012
City Manager, Holly Hill, FL (population 13,000) in 2008 (partial search)
City Manager, Homestead, FL (population 62,000) in 2010
City Manager, Indianola, IA (population 15,108) in 2015
Town Manager, Juno Beach, FL (population 3,600) in 2005
Village Manager, Key Biscayne, FL (population 11,000) in 2007 and 2011
City Manager, Key West, FL (population 24,600) in 2012
Town Manager, Lake Park, FL (population 9,100) in 2001 and 2003
Town Manager, Lantana, FL (population 9,600) in 2000
City Manager, Lake Worth, FL (population 37,000) in 2003 and 2007
City Manager, Lauderdale Lakes, FL (population 32,000) in 1998 and 2002
City Manager, Leesburg, FL (population 20,390) in 2013
City Manager, Madeira Beach, FL (population 12,300) in 2011
Town Manager, Mangonia Park, FL (population 1,400) in 2001
City Manager, Marathon, FL (population 11,500 in 2002 and 2004
City Manager, Marco Island, FL (population 15,000) in 2014
City Manager, Medina, WA (population 3,000) in 2013
City Manager, Melbourne, FL (population 72,500) in 2012
City Manager, Miami Gardens, FL (population 101,000) in 2004
City Manager, Mill Creek, WA (18,828) in 2015
City Manager, Miramar, FL (population 122,000) in 2013
City Manager, Monroe, NC (population 33,500) in 2013
City Manager, Mount Dora, FL (population 12,000) in 2005
City Manager, Mount Pleasant, MI (population 26,000) in 2014
City Manager, Mountlake Terrace, WA (population 20,700) in 2014 and 2016
City Manager, New Smyrna Beach, FL (population 23,000) in 2009
City Manager, Normandy Park, WA (population 6,335) in 2013 and 2015
City Manager, North Miami, FL (population 62,000) in 2010 and 2014
Village Manager, North Palm Beach, FL (population 12,500) in 2004, 2005, 2007 and 2012
City Manager, North Port, FL (population 55,800) in 2011
City Manager, Norwich, CT (population 40,500) in 2016
City Manager, Oakland Park, FL (population 42,800) in 2014
City Manager, Ocala, FL (population 52,000) in 2008 and 2015
City Manager, Orange City, FL (population 10,000) in 2010 and 2016
City Manager, Orange Park, FL (population 9,100) in 2010
City Manager, Oviedo, FL (population 33,000) in 2008

City/Town/Village Manager/Administrator (continued)

City Manager, Palm Bay, FL (current population 101,000) in 2002 and 2015
City Manager, Palm Coast, FL (population 71,000) in 2006
Village Manager, Palmetto Bay, FL (population 24,000) in 2003
City Manager, Panama City Beach, FL (population 12,018) in 2012
City Manager, Parkland, FL (population 30,177) in 2017
City Manager, Petersburg, VA (population 32,701) in 2017
Village Manager, Pinecrest, FL (population 19,300) in 2011
City Manager, Pompano Beach, FL (population 101,000) in 2007
City Manager, Port St. Lucie, FL (population 174,100) in 2016
City Manager, Portland, ME (population 65,000) in 2011
City Manager, Prosser, WA (population 5,802) in 2016
City Manager, Riviera Beach, FL (population 37,000) in 2009
City Manager, Roanoke, VA (population 98,465) in 2009 and 2017
City Manager, Sarasota, FL (population 55,000) in 2012
City Manager, Satellite Beach, FL (population 10,100) in 2013
City Manager, Savannah, GA (population 142,800) in 2016
City Manager, Scottsdale, AZ (population 217,400) in 2013 in 2013
City Manager, Seminole, FL (population 17,800) in 2015
City Manager, Sequim, WA (population 6,700) in 2015
Town Manager, Sewall's Point, FL (population 2,000) in 2006
Township Manager, Springettsbury Township, PA (population 26,700) in 2014 and 2016
City Manager, St. Pete Beach, FL (population 10,000) in 2014
City Manager, Stuart, FL (population 17,000) in 2006 and 2017
City Manager, Sunny Isles Beach, FL (population 17,000) in 2006 and 2011
City Manager, Sunrise, FL (population 84,400) in 2012
City Manager, Sunnyside, WA (population 15,860) in 2013
Town Manager, Surfside, FL (population 6,000) in 2014
City Manager, Tacoma, WA (population 200,000) in 2011 and 2017
City Administrator, Tavares, FL (population 11,000) in 2006
City Manager, Titusville, FL (population 43,940) in 2014
City Manager, Treasure Island, FL (population 6,937) in 2017
City Manager, West Melbourne, FL (population 15,000) in 2009
City Manager, West Park, FL (population 12,000) in 2005 and 2010
City Manager, Winchester, VA (population 26,000) in 2014
City Manager, Winter Haven, FL (population 37,900) in 2017
City Manager, Yakima, WA (population 91,000) in 2011 and 2012

County Administrator / Manager - Completed Searches

County Manager, Alachua County, FL (population 251,400) in 2014
County Manager, Baker County, FL (population 27,000) in 2006
County Administrator, Bay County, FL (population 158,000) in 2005
County Manager, Brevard County, FL (population 536,000) in 2009

County Administrator / Manager - Completed Searches (continued)

County Administrator, Broward County, FL (population 1,800,000) in 2006
County Administrator, Clackamas County, OR (population 383,900) in 2013
County Administrator, Clay County, FL (population 160,000) in 2005 and 2011
Chief Administrator, El Paso County, TX (population 827,700) in 2014 and 2016
County Administrator, Emmet County, MI (population 32,900) in 2014
County Manager, Flagler County, FL (population (83,000) in 2007
County Manager, Fulton County, GA, (partial search) in 2015 (population 894,300) in 2015
County Administrator, Hernando County, FL (population 172,800) in 2012
County Administrator, Highlands County, FL (population 98,000) in 2008
County Administrator, James City County, VA (population 69,000) in 2014
County Administrator, Martin County, FL (population 140,000) in 2005
Borough Manager, Matanuska-Susitna Borough, AK (population 85,000) in 2011
County Administrator, Monroe County, FL (population 80,000) in 2004
County Administrator, Nassau County, FL (population 60,000) in 2004
County Administrator, Okaloosa County, FL (population 183,500) in 2013
County Administrator, Okeechobee County, FL (population 39,000) in 2008
County Manager, Osceola County, FL (population 235,000) in 2003 and 2007
County Administrator, Polk County, IA (population 400,000) in 2007 and 2011
County Manager, Seminole County, FL (population 410,000) in 2006
County Administrator, St. Johns County, FL (population 162,000) in 2007
County Administrator, St. Lucie County, FL (population 284,000) in 2014
County Manager, Union County, NC (population 198,600) in 2010
County Administrator, York County, VA (population 66,269) in 2015

Completed Searches – Assistant/Deputy Managers

Assistant City Manager / Operations, Corpus Christi, TX (population 308,000) in 2013
Assistant City Manager / Utilities, Corpus Christi, TX (population 308,000) in 2014
Deputy City Manager, Danville, VA (43,000) in 2016
Deputy City Administrator, Dickinson, ND (population 22,300) in 2016
Deputy City Manager for Community Building, Durham, NC (population 220,000) in 2009
Assistant Town Manager, Jupiter Island, FL (population 654) in 2010
Assistant Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1998
Assistant City Manager, Lake Worth, FL (population 37,000) in 2004
Assistant County Administrator, Martin County, FL (population 140,000) in 2006
Deputy City Manager, Sammamish, WA (60,000) in 2016
Assistant City Manager, Tamarac, FL (population 55,500) in 2001
Assistant City Manager, West Palm Beach, FL (population 101,000) in 2004 and 2013

Completed Searches – City or County Attorneys

County Attorney, Clay County, FL (population 196,400) in 2016
City Attorney, Daytona Beach, FL (62,300) in 2016
City Attorney, Fort Pierce, FL (population 41,590) in 2016
County Attorney, Fulton County, GA (population 996,319) in 2015
City Attorney, Port St. Lucie, FL (population 174,100) in 2016
County Attorney, Prince William County, VA (population 438,580) in 2015
City Attorney, Roanoke, VA (population 96,000) in 2012
Fire District Attorney, St. Lucie County Fire District, FL (population 298,600) in 2017
City Attorney, West Melbourne, FL (population 15,000) in 2008

Completed Searches – Community Development/Growth Management/Planning

Growth Management Director, Collier County, FL (population 357,305) in 2015 and 2017
Community Development Director, Danville, VA (population 43,000) in 2016
Director, Building and Development, Loudoun County, VA (population 336,900) in 2014
Community Development Director, Miami, FL (population 408,000) in 2008
Director of Planning, Building and Development, Roanoke, VA (population 96,000) in 2012
General Manager, North Sarasota Redevelopment District, Sarasota (population 53,000) in 2008
Growth Management Director, St. Lucie County, FL (population 261,000) in 2005
Community Development Director, Tamarac, FL (population 55,500) in 2007
Growth Management Manager, Wellington, FL (population 55,000) in 2009

Completed Searches – Economic Development / Redevelopment

Executive Director, Camden County (GA) Joint Development Authority (pop. 51,400) in 2014
Economic Development Director, Collier County, FL (population 328,000) in 2012
Assistant City Manager for Community Building, Durham, NC (population 220,000) in 2009
Economic Development Director, Concord, NH (population 42,444) in 2017
Economic Development Director, Roanoke, VA (population 96,000) in 2012
Director, Office of Economic & Workforce Development, Durham, NC (pop. 220,000), 2009
Economic Development Director, Loudoun County, VA (population 326,000) in 2010
Economic Development Director, St. Johns County, FL (population 162,000) in 2011

Completed Searches – Engineers

City Engineer, Gulfport, MS (population 90,000) in 2008
Director/Engineering/Public Works /Utilities, Hallandale Beach, FL (population 39,000) 2013
Deputy County Engineer, Martin County, FL (population 140,000) in 2006
Assistant City Engineer, Melbourne, FL (population 75,000) in 2008
City Engineer, Sunny Isles Beach, FL (population 17,000) in 2006
Staff Engineer, Wellington, FL (population 55,000) in 2009

Completed Searches – Facilities Management

Director, Performing Arts & Convention Center, Federal Way, WA (population 92.700) in 2015
Director, Landscaping, Weston, FL (population 65,300) in 2013

Completed Searches – Finance and Budget

Finance Director, Altus, OK (population 19,800) (background check) in 2012
Finance Director, College Park, MD (population 32,256) in 2016
Procurement Director, Collier County, FL (population 357,305) in 2016
Finance Director, Danville, VA (population 43,000) in 2014
Finance Director, Daytona Beach, FL (population 31,860) in 2012
Finance Director, DeLand, FL (population 28,230) in 2016
Finance Director, Escambia County Housing Authority (population served: 302,700) in 2014
Finance Director, Fort Walton Beach, FL (population 20,000) in 2006
Director, Management & Financial Services, Loudoun County, VA (population 326,000) in 2012
Manager, Office of Management and Budget, Lake Worth, FL (population 37,000) in 2010
Finance Director, Lauderdale Lakes (population 32,000) in 1998
Finance Director, Miami, FL (population 408,000) in 2013
Finance Director, Miramar, FL (population 130,300) in 2016
Treasurer, Miami, FL (population (408,000) in 2013
Finance Director, Oregon City, OR (population 31,860) in 2012
Finance Director, Petersburg, VA (population 32,701) in 2017
Finance Director, Roanoke, VA (population 99,000) in 2014
Director of Finance and Administration, Roanoke Regional Airport, Roanoke, VA, in 2014
Revenue Operations Director, Savannah, GA (population 142,800) in 2017
Budget Director, St. Petersburg, FL (population 248,000) in 2009
Finance Director, St. Petersburg, FL (population 248,000) in 2010
Finance Director, Sunny Isles Beach, FL (population 17,000) in 2010
Finance Director, Surfside, FL (population 5,700) in 2012
Finance Director, Tamarac, FL (population 55,500) in 2005 and 2009
Finance Director, West Palm Beach, FL (population 101,000) in 2007

Completed Searches – Fire/EMS/Dispatch

Fire Chief, Cape Coral, FL (population 154,300) in 2013
Fire Chief, Lauderdale Lakes, FL (population 32,000) in 1999
Executive Director, South Sound 911 (serves a population of 808,000), Tacoma, WA, in 2013
Fire Chief, West Palm Beach, FL (population 101,000) in 2005

Completed Searches – General Services / Administration

General Services Director, Loudoun County, VA (population 349,700) in 2015

Completed Searches – Housing/Building

Building Official, Jupiter Island, FL (population 580) in 2005 and 2010
Building Official, Miami Beach, FL (population 91,000) in 2005
Building Official, Jupiter Island, FL (population 580) in 2005 and 2011
Building Official, Miami Beach, FL (population 91,000) in 2005
Building Official, Sewall's Point, FL (population 2,000) in 2006
Building Official, Tamarac (population 55,000) in 2008

Completed Searches – Human Resources

Human Resources Director, Boca Raton, FL (population 84,000) in 2006
Human Resources Director, Cape Coral, FL (population 154,300) in 2013
Director, Human Resources, Gainesville, FL (population 125,000) in 2014
Director of Personnel, Fulton County, GA (population 992,000) in 2010
Director, Human Resources, Hillsborough County, FL (population 1,292,000) in 2015
Human Resources Office, Loudoun County, VA (population 326,000) in 2011
Human Resources Administrator, Martin County, FL (population 140,000) in 2007
Personnel Director, North Miami, FL (population 56,000) in 2001
Director, Human Resources, Sunrise, FL (population 88,800) in 2015
Director, Human Resources, Roanoke, VA (population 99,000) in 2014
Personnel Director, Vero Beach, FL (population 17,900) in 2003
Human Resources Director, West Palm Beach, FL (101,900) in 2013 and 2014

Completed Searches – Health and Human Services

Director, Health and Human Services, St. Johns County, FL (population 162,000) in 2010

Completed Searches – Information Technology

Information Services Director, Cooper City, FL (population 33,382) in 2017
Information Services Director, Lauderdale Lakes, FL (population 32,000) in 1998
Information Services Director, Palm Beach County Tax Collector (population 1,300,000) in 2012 (partial search)
Chief Information Officer, Weston, FL (population 65,300) in 2015

Completed Searches – Parks/Recreation/Libraries

Parks and Recreation Director, Deerfield Beach, FL (population 78,041) in 2017
Director, Parks, Recreation, & Conservation, Hillsborough County, FL (pop. 1,292,000) in 2015
Director, Parks and Recreation, Hobbs, NM (population (35,000) in 2014
District Manager, Holiday Park Recreation District (population 1,400) in 2007
Library Services Director, St. Johns County, FL (population 162,000) in 2007
Director, Parks and Recreation, West Palm Beach, FL (population 101,000) in 2006

Completed Searches – Police

Police Chief, Golden Beach, FL (population 355) in 2011 (partial search)
Police Chief, Farmington, NM (population 45,900) in 2014
Police Chief, Lauderhill, FL (population 66,900) in 2011 (partial search)
Police Chief, Melbourne, FL (population 76,000) in 2011 (partial search)
Chief of Police, Mooresville, NC (population 35,300) in 2016
Police Chief, Petersburg, VA (population 32,701) in 2017
Director of Administration – Public Safety, Ocean Reef Community Association in 2016
Police Chief, Sewall's Point, FL (population 2,000) in 2007
Police Chief, St. Augustine Beach, FL (population 6,200) in 2012
Police Chief, Sunny Isles Beach, FL (population 17,000) in 2010
Police Chief, Winchester, VA (population 27,216) in 2017

Completed Searches – Public Works

Public Works Director, Aventura, FL (population 37,200) in 2016
Public Works Director, Chandler, AZ (population 250,000) in 2007
Public Works Director, Fort Lauderdale, FL (population 183,000) in 2004
Vice President, Public Works & Operations, Ocean Reef Community Association (population 2,000), Key Largo, FL, in 2001
Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012
Public Works Director, Sammamish, WA (60,000) in 2016
Director/Capital Projects Manager/City Engineer, Sunny Isles Beach, FL (pop. 17,000) in 2007
Assistant Public Works Director, Sumter County, FL (107,000) in 2015
Assistant Public Works Director, Sunny Isles Beach, FL (population 17,000) in 2008
Public Works Director, Tamarac, FL (population 55,500) in 2003
Solid Waste Director, Tampa, FL (population 335,700) in 2014
Director, Landscaping, Weston, FL (population 65,300) in 2013

Completed Searches – Utilities

Water Resources Director, Asheville, NC (population 87,200) in 2015
Utility Director, Danville, VA (population 43,000) in 2015
Power & Light Division Director, Danville, VA (population 43,000) in 2015
Water and Gas Director, Danville, VA (population 43,000) in 2016
Utilities Manager, Deerfield Beach, FL (population 78,041) in 2017
Executive Director, Des Moines (IA) Water Works (serves a population of over 500,000) in 2012
Executive Director, Florida Keys Aqueduct Authority, Key West, FL (pop. 90,000) in 2003
Waterworks Director, Newport News, VA (population 183,000) in 2017
Executive Director, Onslow Water & Sewer Authority (Jacksonville, NC) (pop. 160,000) in 2009
Utilities Director, Panama City, FL (population 38,286) in 2017
Executive Director, Sewerage and Water Board of New Orleans (population 369,000)
General Manager, Tampa Bay Water (population served 2,400,000) in 2008
Utilities Director, Lake Worth, FL (population 37,000) in 2009

Completed Searches – Utilities (continued)

Utilities Director, Palm Bay, FL (population 101,000) in 2005
Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012
Director, South Martin Regional Utilities (population 22,000) in 2013
Water (Wastewater) Resources Director, St. Petersburg, FL (population 248,000) in 2008
Watershed Management (Water and Wastewater) Director, DeKalb County, GA (population 691,900) in 2011 and 2013

Completed Searches – Work Force Management

Director, Office of Economic & Workforce Development, Durham, NC (pop. on 220,000), 2009

Completed Searches – Other

Chief Executive Officer, Chatham Area Transit, Savannah, GA (population served 286,900) in 2016
Chief Operating Officer, Amelia Island Plantation Community Association (population 3,000) in 2016
City Clerk, Lauderdale Lakes (population 32,000) in 1998
Director, Registrations and Elections, Fulton County, GA (population 992,000) in 2009
Environmental Resources Director, St. Lucie County, FL (population 261,000) in 2009
Executive Director, Bartow Municipal Airport Development Authority, Bartow, FL in 2017
Executive Director, Lakewood Ranch Inter-District Authority (population 15,000) in 2011
Executive Director, Northern Palm Beach Improvement District, Palm Beach Gardens, FL (population 200,000) in 2003
Executive Director, Sun City Summerlin Home Owners Association, Las Vegas, NV (population 14,000) in 2015 and 2017
General Manager, Chittenden Solid Waste District, Williston, VT (population 157,461) in 2016
General Manager, Holiday Park Recreation District, FL (population 4,500) in 2007
Libraries and Information Services Director, Newport News, VA (population 183,000) in 2017
Special Projects Coordinator, Islamorada, Village of Islands, FL (population 7,500) in 1998
Vice President for Administration, Ocean Reef Communication Association, Key Largo, FL in 2017

Appendix B

Sample Brochure:
City Manager Search
Treasure Island, FL

Welcome to the City of Treasure Island

City Manager Position Available—Apply by September 13, 2017

Treasure Island is a slice of paradise, a beachside community located on the Gulf of Mexico. It is quaint little island with a lively, beach-y vibe, plenty of sea-salt air and rows of beautiful palm trees. The tourist industry thrives here with resorts, restaurants, and glittering white sand. The beaches and the water are the real treasures here. Living close to the lapping waves and sunshine truly is a piece of heaven.

The city has three distinct beach areas. The first and widest is mid-island. Located there are most of the gulf-front motels, hotels, and condo-hotels. Its commercial area offers many restaurants and shops within walking distance of

one another. The almost mile-long concrete Treasure Island Beach Trail parallels the shore and offers scenic views aplenty. It is perfect for an evening stroll, skateboarding, bicycling, and running. For the more adventurous, the water offers opportunities for boating, fishing, scuba diving, snorkeling, kayaking, paddle boarding and jet skis. Then there are the Florida skies for parasailing and paragliding. Can you think of a better place to take to the air or the water?

At the ends of the island lie John's Pass and Sunshine Beach to the north and Blind Pass and Sunset Beach to the south. These beaches are narrower, but stunningly beautiful. They are more residential than commercial and offer a wide variety of housing. The extraordinary architecture ranges from cottages to Key West-styled three-story homes. Sunset Beach's boardwalk circles the tip of the island and is a popular spot for fishing and sight-seeing. Surprisingly these beaches are rarely crowded, and it's possible to see dolphins in the waters surrounding the island. In addition, both public and private marinas as well as a yacht club are available.

Treasure Island is the Sand Sculpture Capital of Florida, and one of the city's many highlights is Sanding Ovations. Formally known as the Master Cup Sand Sculpting Competition and Music Festival, this annual event is highlighted by a four-day competition that pits ten sand-sculpting masters from North America, Europe, and Asia against each other. It's free and will be held this year from November 15th to November 19th. You won't want to miss it even if you do not get the city manager job!

Cultural opportunities are many although not directly in the city. A little more than a stone's throw away is Downtown St. Petersburg and its famed arts district which hosts the Mahaffey Theater, the Museum of Fine Arts, the Great Explorations Children's Museum, the St. Petersburg Museum of History, the Holocaust Museum, and the Salvador Dali Museum (with the largest collection of Dali's works outside of Europe). Also located in St. Petersburg, you will find the Tampa Bay Rays major league baseball team. Nearby in Clearwater is the Ruth Eckerd Hall which hosts a variety of musical, cultural and cinematic events.

Nearby Tampa offers the David A. Straz Jr. Center for the Performing Arts, the Tampa Theatre, the Gorilla Theatre, the MidFlorida Credit Union Amphitheatre and the Florida State Fairgrounds. Performing arts companies and organizations which call Tampa home include the Florida Orchestra, Opera Tampa, Jobsite Theater, Master Chorale of Tampa Bay, Stageworks Theatre, Spanish Lyric Theatre, and the Tampa Bay Symphony. The NFL's Tampa Bay Buccaneers and the NHL's Tampa Bay Lightning play their home games in Tampa.

Tampa International Airport is nearby and is a jumping off spot to virtually anywhere in the world. Lesser known is St. Pete-Clearwater International Airport that offers low cost service on Allegiant to a variety of points within the United States. Low cost service is also offered to Canada. If you like to cruise, the Port of Tampa (40 minutes to the east) offers many opportunities to visit the Caribbean and the Gulf of Mexico. A bit further away lie Orlando International Airport (41st busiest airport in the world) and the three busiest cruise ports in the world by volume (the Port of Miami, Port Everglades, and Port Canaveral).

Less than two hours to the east by car is Orlando, the country's fourth most popular city. Residents and visitors can attend cultural performances second to none at the Dr. Phillips Center for the Performing Arts, watch the Orlando Magic basketball team at the Amway Center, or visit some of America's most popular tourist attractions—Disney World, Universal Studios and SeaWorld.

The cost of property in Treasure Island varies greatly. Zillow lists the median home value as $337,700, though some properties easily surpass $1,000,000. A nice three bedroom/two bath will likely cost $500,000. Crime is relatively low here due, in part, to the city's community policing strategy.

Treasure Island is in the Pinellas County School District, which is the seventh largest in the state. While no schools are located within the city limits, the District provides a wide variety of opportunities including magnet programs and academies. Higher education is available nearby at Keiser University, University of South Florida and St. Petersburg College. For those willing to travel farther, the University of Florida, the University of Central Florida, the Florida State University, and the University of Miami offer large, popular campuses and excellent educational opportunities.

Once home to pirates, smugglers, and conquerors, Treasure Island is a stunning, scenic place for residents and tourists alike. a clean, enticing environment, a quaint community, and a diversity of things to do. It's no wonder that so many are charmed by the city. If you are as well, we invite you to dust off your resume and come to the sun to help shape Treasure Island's future.

HISTORY

After the original Native American tribes who inhabited the island were driven off by Spanish treasure hunters in 1538, the island became a popular hiding place for the pirates and smugglers who sailed the Gulf of Mexico. Not

Table 1: Treasure Island Demographics

2016 Estimated Population: 6,783			
Distribution by Race		Distribution by Age	
Caucasian	96.1%	0 to 15	10.4%
African American	0.0%	15 to 25	4.8%
Asian	1.7%	25 to 45	15.3%
Native American	0.0%	45 to 65	38.7%
Two or More Races	2.2%	65 to 85	27.2%
Hispanic (all races)	5.2%	Over 85	3.6%

Other Statistics		Median Age	
Poverty Rate	9.7%	Treasure Island	56.0
		U.S.	37.8

Educational Achievement (*over age 25*)	
High School or Higher	95.6%
Bachelor's Degree or Higher	42.6%

Source: U.S. Census Bureau

a great deal happened on the island for the next 350 years. Towards the end of the period, it was primarily home to itinerant fisherman living in shacks and houseboats.

Tourism began in the early 1900s when ferries began to bring St. Petersburg residents across the water to the island for a holiday at the beach. Treasure Island got its name in 1918 when a property owner attempted to generate interest in his property by burying wooden chests on the beaches. Claiming these chests were discovered and filled with treasure, the news spread and people began to refer to the area as Treasure Island.

Development began in earnest shortly after the completion of the Treasure Island Causeway in 1939 which allowed access to the island by road. Advertised as the "Best Constructed Bridge in Florida," it provided easy access by car and the island flourished. The city saw a surge in residential and hotel construction after World War II. To create opportunities for construction, developers began to build manmade fingers of land along the edge of the island. These fingers allowed direct access to the water and were popular with homeowners.

Over the years, four municipalities had developed on Treasure Island. In 1955, they were merged by an act of the Florida legislature and re-incorporated as Treasure Island. Today Treasure Island is built out and a thriving community which is also undergoing a considerable amount of redevelopment.

DEMOGRAPHICS

For information about Treasure Island's demographics, please see Table I to the left.

CLIMATE

Treasure Island's climate is characterized by warm, humid summers and cooler, drier winters. A rainy season spans June through September. The temperatures range from an average high of 92 degrees in the summer to the low 70s in the winter. During the summer, the average lows are in the mid to high 70s and in the mid–50s in the winter. The average precipitation is 49.58 inches, and snow is extremely rare.

Like the rest of the Tampa Bay Area, Treasure Island is struck by infrequent tropical storms and hurricanes. In fact, the Tampa Bay area has not been hit by a Category 3 storm since 1921. Further, if you are more than 50 miles from the hurricane's center, it will probably not materially affect you. A Category I hurricane produces winds from 75 to 95 miles per hour—not much faster than we routinely drive our cars.

Figure 1

GEOGRAPHY

Treasure Island is located on a barrier island in the Gulf of Mexico (see Figure 1).

It covers 5.3 square miles, of which 1.6 square miles is land and 3.7 square miles is water. It is ten miles west of downtown St. Petersburg and about 30 miles west of Tampa. Orlando lies 120 miles to the east. Overall the city lies approximately five feet above sea level.

COMMERCE

Much of Treasure Island's economy is directly tied into its tourism industry—the Bilmar Resort, the Thunderbird Resort and the new Treasure Island Resort are located on the beach. Many other hotels and condominiums are on the water. The diversity of restaurants is a draw—there's something for everyone in Treasure Island's downtown, and that includes employment opportunities. See Table 2 for more information on principal employers.

Table 1: Principal Employers, Treasure Island, FL

Employer	Industry	Employees
Bilmar Beach Resort & Sloppy Joe's	Food	168
City of Treasure Island	Government	115
Publix Super Markets, Inc	Retail	114
Middle Grounds Grill	Food	80
Gator's Café & Saloon	Food	72
The Club at Treasure Island	Entertainment	62
Allied Specialty Insurance	Insurance	60
Thunderbird, Tahitian	Service	56
Caddy's	Food	54
Treasure Island Beach Resort	Service	45

Source: City of Treasure Island, FL 2016 CAFR

THE GOVERNMENT

Treasure Island incorporated in 1955. It is governed by a five-member commission and is composed of a mayor and four commissioners. The mayor is elected at large and serves a three-year term. Each commissioner represents a geographic district (and must reside in that district). Terms are staggered with the Commissioners serving two year terms. The current mayor was first elected in 2009 and plans to retire at the end of his

term in 2018. The other four commissioners are all in their first full term and the city does not have term limits. The Commissioners are fiscally conservative and love their community. They serve so that they can make Treasure Island a better place. By and large, they respect one another although discussions can be spirited. Many votes are 4-1. The Commission Members think very highly of their staff.

Treasure Island is a full service city and provides the following: community development, fire, police, public works, recreation, sanitation and stormwater and wastewater collection. Internal services include finance, human resources, and information technology. The city's total budget for FY 2018 budget is $24,255,910, with the general fund composing $12,035,884 of the total. Treasure Island has 99 employees. The city has two unions: the International Association of Fire Fighters representing fire employees and the Police Benevolent Association representing law enforcement employees.

THE CHALLENGES AND OPPORTUNITIES

While Treasure Island has a strong staff and nothing is broken, it does face some significant challenges. The first and foremost is its finances are limited and there are some needs. Thus, resources will need to be managed carefully.

Second, the city owns the bridge connecting it to St. Petersburg. 10-years old, it is in relatively good condition although periodic and routine maintenance expenditures are required. All maintenance is funded out of the city's General Fund. The city has pursued a variety of options including giving the bridge to the county or state but so far has not been successful. Currently the city has engaged a consultant to develop a Financial Stability Plan for both the drawbridge and the causeway.

Third, the city hall was built in the 1950s, is outdated, in poor condition and needs to be replaced. A needs assessment is being conducted to review the city's other facilities as well.

To address these needs, taxes could be raised but that is never popular. Alternatively, new development would grow the tax base. The difficulty it that, while the residents as a whole support development, they are also very comfortable with the community as it is and with current restrictions on building heights and density. Thus significant increases to the tax base will probably not come quickly.

Other issues include a law suit involving parking on the beach. It was heard in the appellate court in December 2015. If the city loses, it will have to pay $500,000 in legal fees. Finally, a long term issue is sea level rise. With the city's relatively low elevation, any increase will lead to additional flooding problems. The city has already begun to evaluate and implement alternatives for dealing with the issue.

THE IDEAL CANDIDATE

Treasure Island is looking for a strong, experienced professional manager to partner with the City Commission to make the city the best it can be. The individual will be a trusted advisor and skilled in building relationships and consensus. At the same time, the city is not looking for a "yes" man or woman. The manager will need to be comfortable telling the Commission diplomatically what it needs to hear rather than what it wants to hear.

The ideal candidate will be proactive, innovative, and have a passion for the city. He/she will be comfortable in the community and spend time interacting with residents and business owners. Customer service will be important to the manager and he/she will lead by example. The customer is not always right but does deserve a fair hearing of his/

her concern. Where the concern cannot be resolved, an explanation of why will be provided. Treasure Island is a small town and people expect their government to work with them to solve their problems.

The manager will be a people person and have outstanding communications skills—not just in speaking and writing but also listening, diplomacy and finesse. He/she will be able to break highly complex issues into simple pieces that everyone can understand. The individual will understand the need to share information with the public and promote transparency.

The next manager will like a challenge, be analytical, and visualize solutions. The individual will be able to anticipate potential issues and resolve them before they become problems. The manager will also have a high degree of integrity.

Realizing resources are limited, the manager will constantly seek better ways of doing business. The individual will set high standards for the staff and expect them to be met. Accountability will be important but so will team building and mentoring. The ideal candidate will set forth priorities, delegate, and then step back and allow those responsible to achieve the results. Overall, the staff is strong and needs a leader, not a micromanager. In fact, the individual will realize the staff members are the city's most important resource and offer encouragement, reward success and win their respect. Part of the manager's role will be to be a mentor and to help staff reach its full potential.

The ideal candidate will have at least seven years of progressively responsible experience in municipal management and at least four years as the manager or assistant manager. A Bachelor's degree from an accredited college or university, with a major in administration, management or a related field, is required. A master's degree is preferred as is being an ICMA Credentialed Manager. Strong financial skills are important.

No one expects any sudden new sources of revenue, so managing what exists efficiently and effectively will be crucial. Experience with tourism and waterfront communities is a plus as is knowledge of public works, project management, inter-governmental relations and the application of information systems to increase productivity.

Finally, the City Commission hopes to find a manager who will view Treasure Island as a jewel in its own right and not a stepping stone.

It hopes its next manager will honor the tradition established by its prior managers and stay a long time.

COMPENSATION

The salary range is $110,000 to $150,000 and will depend on qualifications and experience. The city realizes it may need to pay close to the top of the range to get the right person. Benefits are excellent. The city contributed 8% to the former manager's ICMA 401 account while the manager was required to contribute 5%. In addition, the city made a 7% contribution into a 457 account.

THE MOST RECENT CITY MANAGER

The most recent manager retired after ten years of service with the city. Managers traditionally have had long tenures with the city.

RESIDENCY

Residency is required unless waived by the City Commission.

HOW TO APPLY

E-mail your cover letter and resume to Recruit33@cb-asso.com by September 13th. Faxed and mailed resumes will not be considered. Questions should be directed to Rick Conner at (915) 227-7002 or Colin Baenziger at (561) 707-3537.

THE PROCESS

Applications will be screened between September 14th and October 17th when the finalists will be selected. A reception and interviews will be held on November 2nd and 3rd. A selection will be made shortly thereafter.

INTERNAL CANDIDATES

It is extremely doubtful that any internal candidates will apply.

CONFIDENTIALITY

Under the Florida Public Records Act, all applications are subject to disclosure upon receipt. As a practical matter, we do not expect coverage until after background materials for the recommended semi-finalists are delivered on October 9th.

OTHER IMPORTANT INFORMATION

The City of Treasure Island is an Equal Opportunity Employer and encourages women, minorities and veterans to apply. A veteran's preference will be awarded per Florida law.

ADDITIONAL INFORMATION

For additional information about the city visit:

http://www.mytreasureisland.org/

COLIN BAENZIGER & ASSOCIATES
EXECUTIVE RECRUITING

Appendix C

Sample Candidate Report

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

Sample Candidate Report

[Note: The following materials are provided with the permission of the candidate.]

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Christopher Morrill

Resume

Christopher Paul Morrill

201 East 52nd Street ● Savannah, GA 31405 ● 912-231-8711 ● kpicikim@yahoo.com

Experience

Assistant City Manager, City of Savannah, GA (population: 143,000) ***8/01 – Present***

Serve as assistant city manager for management & financial services, leading a full service organization with a staff of 2,600 and annual budget of over $280 million. Represent the City on boards and committees, oversee financial, human resource and strategic planning, directly supervise 12 departments, coordinate major economic development projects, and lead special projects and analyses, including:

- Ellis Square Public/Private partnership which included 1,100 space underground public parking garage supporting a private hotel/condo/retail development, $400 million extension of Savannah's downtown commercial/residential areas, and 4,000 acre traditional neighborhood development;
- Priority based budgeting process that involved over 100 employees in developing the 2010 city service program and budget which was reduced by over $10 million without layoffs, delaying capital maintenance, or across the board cuts.
- Merger of City and County police departments under City management;
- Recruitment and hiring of police chief, fire chief, and assistant city manager for public development;
- Annexations that have increased the size of the City by over 19,000 acres;
- Geographically based 311 customer service/work order system;
- Civic Master Planning process which received the 2009 Charter Award from the Congress of New Urbanism and the 2009 Excellence in Government Finance Award from the Government Finance Officers Association of the United States & Canada
- Local Options Sales Tax negotiations on allocation of over $250 million that must be shared among Chatham County, Savannah and six other municipalities; and,
- G-8 Sea Island Summit public safety and security planning for the diplomats, international press, and activists based in Savannah for the three day Summit in June 2004.

Senior Municipal Finance Advisor, Research Triangle Institute, RTP, NC ***10/99 – 8/01***

Served as resident advisor on local government finance and management for the National Treasury of the Republic of South Africa. This position entailed assisting the National Treasury's chief director of Local Government with developing and implementing a new fiscal framework for municipalities, reforming municipal budgeting systems, and developing the capacity of local government finance officers and systems in post-apartheid South Africa.

Fellow, Kellogg National Leadership Program, ***1997 - 2000***

One of 38 individuals chosen for this national program designed to prepare leaders for the challenges of the 21st century. Fellowship activities included studying conflict resolution and community building in Northern Ireland, South Africa, China, and Peru and studying Spanish in Granada, Spain. Also assisted a group of unemployed women in a former township area outside of Pretoria, South Africa, with developing a chicken breeding facility that was funded through a grant from the Kellogg Foundation.

Research and Budget Director, City of Savannah, GA ***12/94-10/99 & 10/90-10/92***

Led an eight member team in all aspects of preparing and monitoring the annual Service Program and Budget, directing analyses, and coordinating research projects. Prepared the City's five-year financial and capital plans. Coordinated federal and state lobbying efforts. Significant accomplishments during my tenure included:

- 1997 City Budget document rated "Outstanding as an Operations Guide" by the Government Finance Officers Association of the US and Canada;
- Developed long-term financial planning model that resulted in the City taking concrete steps to significantly reduce debt levels and decrease the property tax rate by over 25%; and,
- Created the City's *Incentive Budgeting System* that rewards departments that achieve performance goals and reduce expenditures.

US Peace Corps Volunteer, City of Lviv, Ukraine (population: 850,000) ***12/92 - 10/94***

Served as a management advisor to the Mayor of Lviv. Major accomplishment included implementing Total Quality Management (TQM) in City Administration that reduced the number of steps in the housing privatization process from 23 to 11, and increased the number of applications processed per month from 1,400 to over 4,000. This accomplishment was featured in a case study by the World Bank.

Senior Management Analyst, City of Savannah, GA ***5/88 - 10/90***

Senior Budget Analyst, Catawba County, NC (population: 105,000) ***8/86 - 5/88***

Downtown Project Manager, Lynn, MA (population: 90,000) ***10/84 - 6/85***

Assistant Camp Director, Elliot P. Joslin Camp **Summers 1984 & 1985**

Other Professional Experience

Instructor, Government Finance Officers Association (GFOA) national courses: *Budgeting Best Practices; Budget Academy;* and *Capital Budgeting and Financial Planning.* International City/County Management Association (ICMA) National Audioconference: *Practical Steps to Successful 311/CRM Service Implementation.*

Presenter, GFOA Annual Conference: *Understanding Your Revenue Portfolio*, 1996; *Best Practices in Capital Planning*, 2007; *Economic Development – Marketing Your Community*, 2008; *Budgeting for Outcomes*, 2009. University of North Carolina at Chapel Hill MPA Alumni Conference: *Managing Your Programs with Limited Resources*, 2003; *Inter-generational Management*, 2005. Florida Government Finance Officers Association Conference: *Finance Director's Role in Economic Development*, 2007. Georgia Municipal Association and Georgia City/County Management Association: *Budgeting for Outcomes*, 2009.

Author, ***The Savannah Story: The Road to Equity and Sustainable Community Development***, with Henry Moore in Economic Development in American Cities: the Pursuit of an Equity Agenda, edited by Michael J. Bennet and Robert P. Giloth, State University of New York Press, 2007, pp. 189 – 214. ***Best Practices: Ellis Square Public/Private Partnership in Savannah***, Government Finance Review, October 2006, pp. 44 – 47. ***Capital Program Considerations in Challenging Times***, Government Finance Review, June 2009, with John Fishbein, pp. 8 – 13. ***The Financial Responsibilities of Local Governments*** in Emerging Issues in Government Financing, Thomson Reuters/Aspatore, 2009, pp. 7 – 24.

Education

- ICMA Credentialed Manager
- Master of Public Administration, The University of North Carolina, Chapel Hill, NC, May 1987
- Bachelor of Arts, College of the Holy Cross, Worcester, MA, Major: Political Science, May, 1984
- Institute for Georgia Environmental Leadership, University of Georgia Fanning Institute, 2007
- Gallup Leadership Institute, 1997
- Certificate in County Administration, North Carolina Institute of Government
- Certificate in Budgeting and Financial Planning, North Carolina Institute of Government

Service

- Government Finance Officers Association: Executive Board (2008 – present), National Standing Committee on Retirement Benefits Administration (2008 – present), National Standing Committee on Economic Development and Financial Planning (2003 – 2008), National Standing Committee on Budget and Management (1996 – 1999);
- Elected School Council representative, Charles Ellis Public Montessori Academy (2005 – 2009)
- President, Leadership Savannah Board of Directors (2007 – Present)
- Executive Board Member, United Way of the Coastal Empire (2007 – Present)
- Elected Official, Southbridge Redevelopment Authority, Southbridge, MA, (1983-1984)
- Volunteer Savannah/Chatham Citizen Advocacy (2003 – Present)
- USA Swimming Certified Stroke and Turn Judge (2008 – Present)

Christopher Morrill

CB&A Interview

Christopher Morrill

Education

Master of Public Administration, University of North Carolina
Bachelor of Arts, College of the Holy Cross

Experience

Assistant City Manager, City of Savannah, GA	2001 – Present
Senior Municipal Finance Advisor, Research Triangle Institute, RTP, NC	1999 – 2001
Research and Budget Director, City of Savannah, GA	1994 – 1999
Peace Corps Volunteer, Ukraine	1992 – 1994
City of Savannah, GA Research and Budget Director (two years) and Senior Management Analyst (two years)	1988 - 1992
Senior Budget Analyst, Catawba County, NC	1986 – 1988
Downtown Project Manager, Lynn, MA	1984 – 1985

Background

The population of Savannah is 143,000 people. The City has 2,600 employees and Mr. Morrill supervises 220. The total budget is $280 million while the general fund component is $180 million. The three most important issues that face Savannah:

- Financial impact of the recession. Revenues have declined yet the demand for services remains high;
- Citizen engagement. Citizen participation in local government, and indeed awareness of what it is doing, has declined. Governments need to find new ways to engage and inform their residents; and
- Balancing the economic development with environmental goals while maintaining a high quality of life.

Interview Comments

Mr. Morrill has been an Assistant City Manager for eight years in Savannah, GA. Although he feels no need to leave his position, he sees the City Manager position in Roanoke as an opportunity that he cannot pass up. Roanoke is a progressive community and has some of the same challenges Savannah has. He notes that over the past 20 years, Savannah has made many significant changes for the better and he wants to bring not just his skills, but what he has learned, to Roanoke. He feels he can make a difference and help Roanoke become not just a better city but a better community. From a personal point of view, it is also one of few cities Mr. Morrill would consider moving to and living in. He enjoys the mountains and would be closer to family.

On a day to day basis, Mr. Morrill's management style is to promote collaboration. Teamwork and unity is important. He empowers his staff to accomplish their goals but provides the guidance to be successful. He is not a micromanager but gives his staff both the responsibility to get the job done but also the authority. Accountability is important as well. In times of crisis, Mr. Morrill will take full command and make the decisions that are necessary. He has a good understanding of when it is appropriate to guide and when he must lead.

Employees who have worked with Mr. Morrill would say he is enjoyable to work with and is a good mentor. He guides his staff and helps them develop. As they set priorities together, he is there to give them the resources and support they need. They would also note that it is not just business. He has a good sense of humor and attempts to make the workplace pleasant. Finally, he feels it is important to celebrate their successes.

The elected officials would say Mr. Morrill is a strong leader. He is proactive, assesses problems quickly and resolves them. He is a good manager and a team player. With the downturn of the economy, Mr. Morrill has taken more of a leadership role. Everyone recognizes that finance is one of his specialties and they tend to lean towards him for advice. He closely monitors the budget and keeps the elected officials well informed of the City's financial status.

Mr. Morrill's greatest strength is in financial planning. He has a strong finance background and is well experienced with budgets. In fact, he served as a resident advisor to the National Treasury of South Africa for about two years. He knows how to build a strong management and financial team. He enjoys learning, tackling new problems and resolving issues. He listens to people so he can understand their issues and learn from them. He is patient and sympathetic.

In terms of weakness, Mr. Morrill recognizes he focuses more on the big picture than the details. To combat this, he surrounds himself with good people who are detail oriented. By doing this, they help him see the details. It also allows him the freedom to pursue the projects and efforts that he and the City Manager feel will lead to improving Savannah.

Mr. Morrill's biggest achievement has been a recent budgeting change in Savannah. Specifically he introduced a new budgeting philosophy called Budgeting for Outcomes to the staff and the City County. He had learned about the approach at a government finance conference in 2007 and thought it would be particularly appropriate in difficult financial times. The idea is to allocate funding to those services that are a priority to the residents instead of focusing on cuts in each department. As such, the City focuses on funding the services with the greatest positive outcomes. It took some effort but he has now educated the staff and Council. Everyone has embraced the idea and last January the Council set the City's seven priorities for the next year. Then teams were created to address the priority teams. In all it involved 70 employees from different departments serving on seven teams. These teams have researched best practices from across the nation and followed examples in Washington and Iowa where the same philosophy has been implemented. They are ninety percent the way through the conversion. The result has been that they have found ways to maintain the core services and reduce costs. The effort has also lead to an increased level of collaboration within the government and in sharing services.

The teams will make a presentation to the Council on November 30th where they will report their progress.

When asked about mistakes, Mr. Morrill spoke of an area just outside of downtown Savannah that was to be developed as a public park and for some other uses. It was a great project that would have had a very positive impact on the neighborhoods in the area. However, the City did not do the leg work upfront to keep the neighborhoods apprised of the nature of the project nor the benefits that would result from the project. As a result, the residents fought the project and it was cancelled. He learned the importance of involving the community early on in a project so they are informed, supportive and can provide input to make the project better. The City missed an opportunity to develop a great area because it assumed the community would support it. The central lesson was, "Do not assume the community members will see and embrace the vision of a project if you do not spend the time educating them."

As the City has changed to Budgeting for Outcomes, it has provided a new way of measuring the performance of the organization. They are able to compare their outcome with other cities across America. Funding is provided to those services that have had clear outcomes of meeting priorities. Mr. Morrill still monitors the individual performance of each employee. At the year's beginning, he discusses their strengths and weaknesses with them and makes a plan to accomplish their goals for the year. Their progress is checked periodically and another formal meeting is conducted at midyear.

When asked about terminating employment, Mr. Morrill noted he has terminated the employment of several employees during his career. He tries to work with those who have performance issues through coaching and mentoring. Sometimes no improvements can be made. The person is simply in the wrong job from the point of view of skills or personality. It is hard to let people go under these circumstances but it has to be done. Ideally you can find a position in the organization that does suit the individual but that is not always a possibility. Those employees who misuse their privileges or break the law are very easy to let go. On one occasion he had to fire an individual in the parks department who was misusing public funds.

Mr. Morrill sees the challenges facing the next Roanoke City Manager as:

- Encouraging economic development that is a good fit with the community;
- Finding ways to help the poor climb out of poverty rate;
- Working with the school board to improve the City's schools;
- Working with the community to improve the neighborhoods; and
- Addressing code enforcement issues.

If given the opportunity to serve as the next Roanoke City Manager, Mr. Morrill would spend his first six months doing the following:

- Examining City's issues;
- Learning the history of the City and its neighborhoods;
- Listening to the Council Members' goals and vision;

- Familiarizing himself with staff's strengths and weaknesses; and
- Assessing the City's financial position. Getting a proposed budget together quickly for the 2010 – 2011 fiscal year will be a priority.

Mr. Morrill feels the new manager must be out in the community and transparent if he/she is to earn the trust of the community. When things are wrong, one must acknowledge that. They also need to be fixed without, to the extent possible, assigning blame. Citizens respect honesty. Also, good citizen engagement helps the residents feel they have a voice in the community. Mr. Morrill mentioned a citizens' academy that Savannah offered. It was an eight week course that focused on the different departments of the city government. He felt after this program the citizens had a better understanding and respect for the city government. They could see all the work that went into maintaining the City and the service the staff rendered in their behalf.

Mr. Morrill has a good relationship with the media. In his current position as Assistant City Manager, he is not in the media much. However, when needed, he has stepped in for the City Manager. He has worked with both television and print. He understands the media play an important role. He is honest and straightforward with his answers.

In his leisure time, Mr. Morrill enjoys being with his family, reading, biking, hiking and swimming. On occasion he has been a judge at swim meets.

Reason for Wanting to Leave Current Position:

Mr. Morrill is happy where he is but would like the opportunity to become a City Manager. He is in the peak years of his career and is ready to lead an organization. He has had the opportunity to work for and be mentored by an outstanding City Manager. He has also participated in the rebirth of Savannah. He wants to put what he has learned into practice in Roanoke. He just feels it is a great community, a community that has not realized its potential and a community he wants to live and work in.

Most Recent Base Salary

$150,000 base salary

Adjectives or phrases Mr. Morrill used to describe himself:

- Enjoys working with people,
- Visionary,
- Progressive,
- Good sense of humor,
- Values relationships, and
- Builds consensus.

Interviewer's Impressions

Energetic, experienced, competent, congenial, and straightforward. Intelligent and creative with a good sense of humor. Has an easy laugh and ready to be a City Manager.

Interviewed by:

Tiffany Gremmert
Colin Baenziger & Associates

Christopher Morrill

Background Checks

Background Check Summary for
Christopher P. Morrill

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Chatham County, GA	No Records Found
Durham County, NC	No Records Found
State	
Georgia	No Records Found
North Carolina	No Records Found

Civil Records Checks:

County	
Chatham County, GA	No Records Found
Durham County, NC	No Records Found
Federal	
Georgia	No Records Found
North Carolina	No Records Found
Motor Vehicle	
Georgia	No Records Found
Credit	Excellent
Bankruptcy	No Records Found
Education	Confirmed
Employment	Confirmed

Christopher Morrill

Reference Notes

Reference Notes
Christopher Morrill

Michael Brown, City Manager, City of Savannah, GA, (912) 658-3523

Mr. Brown hired Mr. Morrill in 1988. He recognized his strong skill set and wanted him to be a part of his management team. When Mr. Morrill went overseas to perform international services, Mr. Brown thought so highly of him that he held positions open for him. He simply wanted him back and on his team.

Mr. Morrill is a very skilled manager and a remarkable person. He combines precise analytical skills with an upbeat and optimistic personality. He is diplomatic with those he serves and considerate to their wants and needs. Mr. Morrill's background makes him a strong candidate. He was in the Peace Corp for two years in Ukraine. He also spent time in Northern Ireland, Peru, and South Africa with the Kellogg National Leadership Program. He wrote a local government finance law for South Africa cities and modeled if after what local governments do in the United States.

Mr. Morrill has led many redevelopment projects in Savannah. The redevelopment of Ellis Square is a recent one and involved redeveloping one of Savannah's squares that was first established in the 1700's. At some point, the square had been turned into a parking lot. Mr. Morrill noted that the lease was expiring and suggested the City redevelop the area as community square. He took the lead on the project and coordinated with developers and city groups. He also oversaw the financing of the project. The new community square is a huge success and is surrounded by shops and restaurants, and includes an underground parking structure.

Another project Mr. Morrill headed was Savannah River Landing, a fifty-four acre undeveloped tract adjacent to the historic downtown. Mr. Morrill coordinated with the developers to include an expansion of the river walk, retail stores, two hotels, single family homes, restaurants, and office buildings. He was the manager of the public part of the project. He forecast the cost of the necessary infrastructure, worked with the developers, rallied the support of the County and schools, and also sold the tax allocation district proposal to the voters. The project is underway and is much anticipated by the community.

Mr. Morrill listens well and is able to identify the essence of what someone is trying to say. He is a good communicator. He also is empathetic and patient. Often the City Council prefers to speak with him rather than the City Manager. He is easier to talk to and knows how to hold his ground. He is a good public speaker. He took a private sector speaker training course that monitored, criticized and improved his speaking skills. He is comfortable presenting.

Mr. Brown, as the City Manager, spends most of his time working with the Council to keep their interests on track. They are often difficult and demanding. He is not able to do much of what he used to do as City Manager. The Metro Police Department also demands much of his time and attention. As a result, he has turned over much of the day-to-day management of the City to Mr. Morrill. That includes projects, budgeting, pension plan changes, and policy initiatives. Although, Mr. Morrill has not officially held the title of City Manager, in reality he has had more

experience in urban city management than some City Managers in other cities. He has dealt with a high poverty rate, a large area of public housing, and many inner city problems.

Mr. Morrill is an ICMA (International City/County Management Association) Credentialed Manager. Through the ICMA he worked with an area in Indonesia to develop their tourism and the historical preservation of the Sultan's Water Palace Complex. This effort was to preserve and restore 50 acres of historic land. He helped the City get grant funding to restore the area. He also helped them write the first historical preservation ordinance. Along with the restoration of the Water Palace, a beautiful shopping corridor was created. Working with the largely Muslim country of Indonesia has educated Mr. Morrill. He was able to associate with the U.S. Ambassador to Indonesia and experience governmental processes in another country.

Again, even though Mr. Morrill does not hold the official title of City Manager, he has the experience and skill set to take this position. Mr. Brown highly recommended him although it would be a huge loss to him personally and to Savannah to have Mr. Morrill leave.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Strong family man,
- Diplomatic,
- Considerate,
- Articulate,
- Humble,
- Well traveled,
- Bright, and
- Optimistic.

Strengths: Analytical skills, financial ability and diverse experience.

Weaknesses: None identified.

Lise Sundrla – Executive Director, Savannah Development and Renewal Authority, Savannah, GA – (912) 651-6973

Ms. Sundrla has known Mr. Morrill since 2001. They have worked as colleagues. The Savannah Development and Renewal Authority is not a city department. As a separate entity they have coordinated economic development in the downtown area of Savannah.

Mr. Morrill has been a critical component for much of the redevelopment in downtown Savannah. He has engaged the City and partnered with other agencies. He was integral to the planning efforts of Ellis Square. This area had been a historical square but was developed into a parking lot. He spent several years cobbling together the funding to restore the area to its original purpose of a public space. An underground parking lot was constructed along with several shops, restaurants and businesses. He was a guide and a mentor to the developers and to

the Renewal Authority on several issues and concerns regarding the project. He also spent many hours working with the Council to gain its support.

Mr. Morrill created strategic goals to focus on revitalizing the Martin Luther King corridor, once a premier historical African American neighborhood bustling with life. The placement of an overpass on I-16 stunted the growth of the area and limited the access to other areas. He has pressed for the overpass to be removed. By doing so, our lost street connections and nine acres of developable land would be reclaimed. He has negotiated local option sales tax and capital improvement dollars to fund the project. He coordinated the efforts of the City, the Renewal Authority and other private entities to stimulate the integral corridor. Already, a full size grocery store has opened in the area.

Another major project Mr. Morrill has orchestrated was Savannah Landing located in eastern downtown Savannah. The area has been underdeveloped since 1909. He secured the funds and involved the necessary agencies. The development links and compliments the historic downtown area. It also opens up connections to six lost streets and expanded the river walk 2,000 feet. Public squares were donated back to the City. Mr. Morrill petitioned for the first tax allocation to be used to support the economic development of the area.

Oddly, when it is time to make a presentation to the City Council, the person who is best is Mr. Morrill. They often try to do things that are not in the best interest of the City. They rely on Mr. Morrill to give them honest criticism and advice. He can speak on their level.

Ms. Sundrla trusts Mr. Morrill implicitly, which she considers a bold statement. She has approached him with personal and political issues. He has offered guidance and solutions to support her efforts. He is gifted with people. He respects others and in turn is well respected. He has excellent communication skills and is an attentive listener.

Mr. Morrill would be a fine choice for City Manager. He is well qualified. He has the skills and the character to lead.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Reliable partner,
- Thorough planner,
- Engaging,
- Mentor,
- Respected, and
- Gifted with people.

Strengths: Team building, vision, people skills, and communication skills.

Weaknesses: None identified.

Lester B. Johnson III – Assistant City Attorney, City of Savannah, GA – (912) 238-5100

Mr. Johnson has known Mr. Morrill since 2001. Mr. Morrill has a fine personality and a calm demeanor. He has a good rapport with the citizens of Savannah. He also has a good working relationship with his staff and with the elected officials.

Mr. Morrill oversees the financial and budget concerns. He keeps a meticulous budget. One of the results is that the City has not needed to use any of its reserves since Mr. Morrill became the Assistant City Manager. As another of his responsibilities, he oversees the Recorder's Court. He makes sure the Court is making more money than the operating budget. He has worked closely with Mr. Johnson to find ways for the Court and the Judge to be more efficient.

Mr. Morrill also oversees all problems with ordinance violations. One of the trickier situations involved the some wealthy and very powerful residents of an historic district and the Savannah College of Art and Design. The neighbors were not happy about having the School in their neighborhood and complained it violated the parking ordinance. The ordinance required that a certain number of off street parking spaces per building were required if the building was to be used and the school did not have enough spaces. Mr. Morrill investigated every building in the area and the school was not the only building without enough parking spaces. To preserve the historic district, satellite parking lots were developed. Students were shuttled from them to the school buildings. Mr. Morrill communicated frequently with the neighbors and calmed their concerns. He demonstrated to them the financial importance the school to the City and how it brought millions of dollars to the community every year. He showed them that it was vital that they worked together. He was a good mediator between these two strong willed entities and was able to find a reasonable compromise.

Mr. Morrill is well respected by the public. He often speaks in town meetings regarding the financial state of projects. A major project was underway to solve the City's drainage issues. He spoke often in the town meetings explaining the project's finances. Many citizens were concerned the funds would run out before it was completed. Mr. Morrill explained in clear terms the financial condition of the project and the status of the contingency funds. He responded well to the large crowd, spoke in simple terms and reassured them that the money was there to complete the effort.

Mr. Morrill is designated to take over the City Manager's position when he is absent. He is also on call for every Council meeting to answer any questions or provide any financial information.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Strong family man,
- Competent individual,
- Calm demeanor,
- Good rapport with others,
- Easy personality, and
- Responsible.

Reference Notes
Christopher Morrill

Strengths: Financial skills, problem solving skills, and building relationships.

Weaknesses: None identified.

Kenneth Sadler – Former Alderman, City of Savannah, GA (912) 661-0484

Mr. Sadler has known Mr. Morrill since 2000. Mr. Sadler was an Alderman for four years.

Mr. Morrill is bright and well educated. Even though finance had been his primary background, he has developed skills in other fields through his position as Assistant City Manager. He is a good leader and provides strength to his staff. Many of them lean on his expertise and ask for his advice. He mentors his staff and helps them grow.

Mr. Morrill's primary skills are in finance and planning. He knows how to maintain the long term financial health of the City and has helped it weather the financial downturn. He did so through sound financial practices and thorough planning. He actually anticipated the financial problems and adequately prepared the City for them. He understands how to spend money responsibly and which services are capable of producing revenue.

Mr. Morrill has a good relationship with each member of Council. He is responsive to their requests. They are willing to delegate to him because he follows up on projects and keeps them informed. He is straightforward and easy to talk to. Frequently Mr. Morrill has been easier to contact and work with than the City Manager.

Mr. Morrill focuses on people. Whether it is a Councilman or a citizen of the community, he will take time to listen to the issues they raise and look for a solution. He has an optimistic demeanor that puts people at ease. He has a good grasp of city issues and a sensitivity to their importance.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Smart,
- Capable,
- Good planner,
- Strong financial background,
- Understands communities, and
- Relates well with people.

Strengths: Organization skills and financial background.

Weaknesses: None identified

Reference Notes
Christopher Morrill

Carol Bell – Central Services Director, City of Savannah, GA (912) 651-6401

Ms. Bell has known Mr. Morrill since 1994. They were colleagues when he was Budget Director and she now reports directly to him in his position as the Assistant City Manager.

Mr. Morrill is a dedicated public servant. He focuses on serving the people and is often a voice for the underprivileged. He volunteers his time to support agencies which help needy citizens. The City has benefited from his strong financial background. He has improved the financial operations by utilizing his analytical skills and thinking beyond the norm. Mr. Morrill is a member of the Government Finance Officers Association (GFOA), has written finance articles and taught classes for the Association.

Mr. Morrill is people oriented. He develops good relationships with entities outside the city government. He makes time to speak with residents and is well respected by them. He is an excellent communicator who can take technically complex issues and easily explain them to the common citizen.

Mr. Morrill has been a fantastic liaison between the City and the County helping facilitate the merger of police departments. Both agencies had their own police departments and had been policing much of the same territory which was not very cost efficient. In 2003, it was decided to formally merge the departments within a year. The merger was complex and Mr. Morrill was a major factor in its success. He focused on the commonalities and the benefits this partnership would provide for the citizens. The two separate departments combined to become the Savannah-Chatham Metropolitan Police in 2005.

Mr. Morrill is team oriented. He has been able to break down barriers, form unlikely partnerships and is creative. An example is a budgeting strategy he introduced to the City called Budgeting for Outcomes. Each department's budget is evaluated and projections are made based on priorities and results. Priorities were established by Council and Mr. Morrill then created seven results teams. Each team consisted of a broad base of global thinkers along with an expert member. For instance, the public safety team might have a member of the Fire Department or Police Department as an expert member. However, the team could also have members from Parks and Recreation, or Social Services. The result has been to bring the departments and their staff members together to accomplish the common goal of cutting costs and carrying out the elected officials' goals.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Analytical,
- Encouraging,
- An advocate for the underprivileged,
- Involved,
- Experienced, and
- Knowledgeable.

Strengths: Dedication to serving the public. Strong background and experience in local government. Excellent people skills.

Weaknesses: None identified.

Jim Burgess - Mayor, City of Social Circle, GA (770) 464-3366

Mr. Burgess has known Mr. Morrill since 1996. He works as a lobbyist for the City of Savannah and is also the Mayor of a small town in Georgia.

As Mr. Burgess lobbies on behalf of Savannah to State Legislature, he relies on Mr. Morrill to provide him with pertinent financial information. Mr. Morrill gives him impact research and analysis reports related to specific pieces of legislation. He creates slides, charts, and graphs for Mr. Burgess to present to the State. He is quick to respond to Mr. Burgess' needs and provides him with thorough information.

Mr. Morrill is bright and well educated. His staff members have a high regard for him and value his high morals. He has strong people skills and is not overbearing. He is very easy to work with because of his first-rate personality.

Mr. Morrill has a good relationship with the governing body. He is very astute about political relationships. They may often disagree, but Mr. Morrill knows when to push and when he must submit. The Council can sometimes be more involved in day to day operations than they should. Mr. Morrill has successfully managed working with this group of individuals.

Mr. Morrill has worked on several successful projects in the community. He focused on cleaning up certain rundown areas and providing renewal in low income communities. One downtown renewal project included a parking facility, the expansion of the river walk, and added retail space. His financial acumen has been a big asset in making these projects successful.

Mr. Morrill has worked under a superb City Manager. He has been fully exposed to his skills and learned much from emulating them. He has academic training and has managed a diverse city. Advancing to City Manager would be an ideal step for him, and the timing is right.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Good personality,
- Strong academically,
- Not overbearing,
- High morals,
- Bright, and
- Quick to respond.

Reference Notes
Christopher Morrill

Strengths: People skills**.**

Weaknesses: None identified.

Dick Evans - CFO, City of Savannah, GA (912) 651-6440

Mr. Evans has known Mr. Morrill since 2001. They have worked together monitoring the finances of the City. Mr. Morrill has a strong background in budgeting and knows how to balance a budget. He is very precise and concerned with numbers.

Mr. Morrill is very good at keeping others informed. He is open, clear, and direct in his communications. He knows how to word financial reports in ways that are understandable to anyone. He is a good consensus builder. He welcomes the input of his staff, keeps them informed,. He then creates the appropriate solution to the problem.

Mr. Morrill pitched the idea of a new budgeting process to the City. It is called Budgeting for Outcomes. He authored this process of establishing priorities first, then budgeting to finance the services which address those priorities. This new process has had the added bonus of organizing all departments to work toward a common goal.

Mr. Morrill developed good relationships with other entities outside the city government including the Chamber of Commerce, the historic community, developers, and other organizations. He represents the City well and has high standards.

Mr. Morrill would make a very good City Manager.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Methodical,
- Personable,
- Analytical,
- Technically strong,
- Competent, and
- Works well with people.

Strengths: Financial skills.

Weaknesses: None identified.

Chris Miller – Creative Economy Consultant, Savannah, GA (912) 484-7192

Mr. Miller is a resident of Savannah and an entrepreneur. He has known Mr. Morrill since 2001. Mr. Morrill has proven a tremendous support and vital contact for Mr. Miller. He helps facilitate Mr. Miller's efforts by being accessible and getting involved in his projects. Mr. Morrill returns calls and follows up. He is open to new ideas and is supportive whenever he feels it will benefit the community. He focuses on results, not on politics. He takes on a role beyond simply handling the paperwork. He sees the whole community as a team. He uses his influence in the government to help outside projects succeed, projects that benefit the community. He understands that, if he helps outside agencies better the community then the pressure on the City to provide these services or changes will lessen or, alternatively, there will be more money to ay for the services.

Mr. Morrill is very patient. He has a pleasant approach to handling difficult situations. Whenever issues become politically charged, he is able to calm the waters, allowing the real issues to become clear. He listens willingly and is open to reconsideration of any preconceived ideas. His goal is to align the community so it can be the best it can be.

At times, Mr. Morrill has had to work with people who do not have the best interests of the City in mind. The options in dealing with such people are either: refuse to work with them, or work with them and realign their interests. Mr. Morrill has been a very positive influence and has a talent for turning negative intent into positive results.

As an example, the Savannah River landing is a 100 million dollar project proposed for the development of 54 acres in the downtown area. The developer had planned to create a gated community of single family homes. Mr. Morrill recognized the importance of developing this area. However, he did not feel a gated community would adhere to the historical sense of the area, nor would it be the best use of the land. He was able to convince the developer to make changes which would benefit them and the City. The project now consists of a 5-star hotel and spa, several luxury condominium towers, 17 single family riverfront homes, 11 blocks of single family town homes, retail stores, restaurants, art galleries and office buildings. Also, the public squares were donated back to the City. Both the developers and the City will greatly benefit from this project, which is currently under construction.

Mr. Miller knows of a major developer out of Atlanta who has taken a special interest in Savannah. He expressed to Mr. Miller that he has chosen Savannah primarily because Mr. Morrill has always been willing to talk to him about his investments. He returns his calls and helps him solve his problems. Encouraged by his interactions with Mr. Morrill, the gentleman will keep investing in the region.

Mr. Morrill deserves the opportunity to move up from his current position as an Assistant City Manager. He needs the freedom to bring about good things. It will be a large loss for the City of Savannah if he is chosen by another municipality, but he will make an excellent City Manager.

Reference Notes
Christopher Morrill

Adjectives or Phrases Used to Describe Mr. Morrill:

- Knowledgeable,
- Resourceful,
- Efficient,
- Possessing integrity,
- Professional, and
- Timely.

Strengths: Ability to work with outside agencies and create cohesion.

Weaknesses: None identified.

Beth Robinson, Human Resources Director, City of Savannah, GA, (912) 651-6925

Ms. Robinson has worked with Mr. Morrill since 1995 and reports directly to him.

Mr. Morrill's strength is in finance. He is well respected and has been nationally recognized for his work by the Government Finance Officers Association (GFOA). He has also been a member of various committees in the financial community. Although finance is his specialty, he has shown himself able to learn skills in many areas and to contribute in those areas.

Mr. Morrill is a team player. Rather than receive all the credit, he wants to see his whole team be praised for their efforts. He values his staff and their talents. As a manager he knows how to help redirect those who are not team players so they learn to collaborate. He is sincere, concerned, and involved. He is a visionary. He can see where the City needs to go and how to get there.

One of the most significant changes Mr. Morrill has made is called Budgeting for Outcomes. He has been the driving force and visionary behind this new method of doing business. It has taught the City to look at its services form the citizens' perspective and understand what services they value. Mr. Morrill has also set up the priority teams. He chose individuals whose vision went beyond their immediate area. He was very successful in identifying their strengths and values. He ensured the teams were a truly representative of all citizens: young and old, male and female, African American and Caucasian. The new budgeting process helped bridge a 15 million dollar shortfall.

Customer service is important to Mr. Morrill. He focuses his team's efforts on providing good service and lives up to that expectation himself. He does not use his position as Assistant City Manager to avoid serving individuals. He takes time to speak with citizens and to help them. He does not like conflict, but knows how to deal with it. He handles problems head on.

Mr. Morrill is a good presenter. He is comfortable in front of employees, citizens, and the Board.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Sincere,
- Involved in the community,
- Professional,
- Articulate,
- Genuine, and
- Earnest.

Strengths: Team building, vision, and good management skills.

Weaknesses: None identified.

Jenny Payne, Management Services Coordinator, City of Savannah, GA, (912) 651-6420

Ms. Payne has known Mr. Morrill since 2005. She reports directly to him. He has been a strong leader and is the heart of the organization. He allows his employees to grow without boundaries. He trusts them and encourages them to do their work. He creates an environment in which the staff want to work hard for him and produce their best work. He is a very qualified individual and often acts as the City Manager when that person is absent.

When making a decision Mr. Morrill collaborates with his team to make the best decision for the community. The results may not always be successful based on some traditional measures of achievement, but they do represent the best interests of the whole community. That is his focus.

The City Council respects Mr. Morrill. They seem to respond to him better than they do the City Manager. Mr. Morrill speaks to each of them using their proper title. He understands they are the most important decision making body in the community so he addresses them professionally and with respect.

Mr. Morrill is very responsive. He quickly returns phone calls. He spends time with residents, often listening to their issues when the problem could possibly be handled by someone else. He is sensitive and in tune. When holding a discussion with someone, he will get up away from his desk to sit at a table, without his phone or Blackberry, so they can talk without distractions.

Mr. Morrill often plays the role of mediator. In one instance, some time ago, the Economic Development Authority was having an awards ceremony in a public place. Savannah Gay Pride group was also in the area handing out flyers. Police who were monitoring the ceremony asked the group to leave. Mr. Morrill was called regarding the situation. Although the Police Chief should have been the one to handle the situation, Mr. Morrill understood the political sensitivity needed. He met with the group and the Police Chief to explain and monitor the discussion. He helped the group understand that the police would have asked any group to leave the venue had the situation been reversed. The request of the Police was meant as an attack against their

specific group. He was successful in calming this group. He even arranged for the Economic Development Authority to follow up with the group and express its regrets.

As explained in earlier references, Ms. Payne mentioned his implementation of Budgeting for Outcomes. This new program has led to collaboration across departments. Another project Mr. Morrill facilitated was a 54 acre development of land adjacent to the historical downtown district. As also previously noted, the owners of the land had wanted to create a gated community. Mr. Morrill was able to convince them that sort of development would not be the best use of the property or nor would it be fit well with the historic downtown area. Together they came up with a plan to develop the area for mixed use, including single family homes, the extension of the river walk, retail spaces, and public squares. A tax allocation district was created, and forty percent of the land was donated back to the community. The owners of the property are very happy with the plan and how it will best meet the needs of the community. The project is in development now. The Master Planning for this project received the 2009 Charter Award from the Congress of New Urbanism and the 2009 Excellence in Government Finance Award from the Government Finance Officers Association of the United States and Canada.

Mr. Morrill has been the Chair for the Leadership Savannah Board of Directors since 2007. Leadership Savannah is an organization that sponsors community leadership, networking, and training. Each year a group of thirty people is selected to participate through an application process. The group reflects the diversity of the community and consists of people from every sector. Mr. Morrill is well respected in this arena. He makes it a priority to participate in their events.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Leader,
- Encouraging,
- Team player,
- Genuine,
- In tune with people, and
- The heart of the organization.

Strengths: Leadership skills and people skills.

Weaknesses: None identified.

Robert "Bob" Bartolotta, City Manager, City of Sarasota, FL, (941) 954-4109

Mr. Bartolotta has known Mr. Morrill since 1989. He was the Assistant City Manager in Savannah when Mr. Morrill was the Senior Management Analyst to his office.

The City has greatly benefited from Mr. Morrill's financial skills. He negotiated a Local Options Sales Tax shares for Savannah along with those of Chatham County, and six other municipalities. He has devised employee incentives measured by productivity, and authored a bonus plan. He is an excellent writer and has published several articles regarding finance. He is a dedicated worker.

Mr. Morrill knows how to simplify complex issues. He can diffuse a heated situation through his patience and calm demeanor. He has a strong moral compass and stands firm in what he believes. He is an advocate for customer service. He has provided training to his staff in customer service. He listens to citizens' complaints and will work with them to solve their problem. He follows up with each citizen to check on the progress of the solution.

Mr. Morrill's communication skills are excellent. He is very talented at talking people through issues and building consensus. He has a excellent vision of the big picture and how to coordinate the efforts of his team.

Mr. Morrill is well prepared to be a City Manager. He manages eleven department heads including Budget, Audit, and Information Systems. He interacts with the Council every day and is well respected by them. He has excellent people skills.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Visionary,
- Consensus builder,
- Focused on people,
- Hard worker,
- Ethical, and
- Excellent writer.

Strengths: Diplomatic skills, people skills, vision, and customer service oriented.

Weaknesses: None identified.

Gregg Schroeder, President, United Way, Savannah, GA, (912) 308-3810

Mr. Schroeder has known Mr. Morrill since 2002. Mr. Morrill is an active member of the United Way Board of Directors. He is very enjoyable to work with because he has a genuine personality.

Mr. Morrill has been a good partner to the United Way. He has been a key player in the success of several projects. One such project involved addressing the need for quality early childhood education. Savannah has a high drop out rate. To combat the problem, the United Way wanted to create a positive educational path for young children through use of a child care center.

The community did not have one. United Way teamed up with a local construction equipment company, JCB Inc. to develop a nationally accredited child care center. Mr. Morrill joined with them as a City representative. JCB and United Way provided the funding for the project, and the City provided the infrastructure for the center. Mr. Morrill shared the same vision as the United Way and used his resources and talents to bring their projects to successful completion.

Mr. Morrill is a key person in the city government. Often staff or citizens will approach him rather than the City Manager. He takes anyone's call and listens sincerely. He is very likable and easy to work with. He has masterminded the financial stability of the City. His implementation of the Budgeting for Outcomes method has been a great success.

In town hall meetings, Mr. Morrill is very good on his feet. He treats others with dignity and respect. He patiently listens to their complaints. Even when Mr. Morrill has to bring bad news to neighborhood associations, he is able to explain the reasons in a manner that helps them understand. He has good rapport with the general public because he responds to their needs.

Mr. Morrill is experienced and well qualified to be a City manager. He is a hard worker and a positive person to be around.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Thorough,
- Accomplished,
- Outcomes focused,
- People oriented,
- Optimistic, and
- Realistic.

Strengths: Team player, vision and dedication to serving the community.

Weaknesses: None identified.

Prepared by: Tiffany Gremmert
Colin Baenziger & Associates

Christopher Morrill

Internet Research

Savannah Morning News (GA)
November 6, 2009

ENMARK, CITY TO TRY FOR COMPROMISE
Author: *LESLEY CONN*

A rezoning request for a planned Enmark station is being delayed two weeks so city officials and Enmark representatives can try to develop a compromise to appease residents dead-set against the station. Poplar Place residents are worried the rezoning will allow Enmark to build a convenience store and pumps at White Bluff Road and Hampstead Avenue, which will further push commercial development into their residential neighborhood.

Several City Council members at Thursday's meeting expressed their support for Enmark, which has promised to build a store that would use subdued colors, low signage and other design elements to better blend with the residential neighborhood. Alderwoman Edna Jackson said she disagreed with City Manager Michael Brown's initial recommendation to deny the rezoning. "That corner has been an eyesore for years," she said. "Anything would be better."

Aldermen Tony Thomas, Van Johnson and Jeff Felser concurred. As council members debated the rezoning, Alderman Clifton Jones repeated and expanded on an allegation from one of the residents. He stated that Ben Farmer, a local real estate agent and member of the Metropolitan Planning Organization, had an agent who had sold the property to Enmark. Alderman Van Johnson called the allegation "very unsettling," and Mayor Otis Johnson directed city staff to investigate the claim. He was uncomfortable that the statement had been made publicly, he said, and said if found untrue, it would be corrected publicly.

Farmer, reached after the meeting, said the claim was untrue. He once had a listing on the property, but it expired with no sale. "We had nothing to do with that transaction. If I had I would have disclosed it." Farmer and Jones spoke late Thursday, and the alderman said he will issue a public apology. "I'm prepared to do that at our next meeting," Jones said.

In other action, the council:

- Did a first read on a revised, proposed ordinance that would require mandatory alcohol server training, registration and permitting. The council had been struggling with how broad the ordinance should be, and after discussion determined it would not expand the requirement to include all hotels, restaurants and other businesses that serve alcohol. Most of the problems with underage drinking center in nightclubs, they agreed, so other establishments would only be forced to comply if they were cited for alcohol-related issues.

- Because of lower sales tax revenues, the city is anticipating receiving $33 million less in special purpose local option sales tax money, which helps fund projects like the Forsyth fort renovation, drainage projects, park improvements and similar work, Assistant City Manager **Chris Morrill** told council during its workshop.

The city had been expecting $160 million, but more likely will receive about $130 million. That will require reviewing the city's list of projects and delaying some of them, **Morrill** said. Council members did a preliminary review of dozens of projects, but will do a more detailed review of projects at its upcoming budget retreat, which is scheduled for Nov. 30.

Morrill also showed council that because of lower revenues, the city is reducing by several million dollars the amount of money it sets aside in its general fund for capital improvements. From 2006 to 2008, the city spent about $5 million. This year, it set aside no money in the fund, and for 2010, plans to set aside $1.6 million. Because of the reduction in funds, the city will concentrate only on needed maintenance projects with those monies.

- The council got an overview of the proposed Historic District Ordinance. Once passed, it will provide specific guidelines for building height, design standards and the approval process for new structures in the district. Brown called the public input and review process "one of the most exhausting" the city has undertaken.

Council will consider the ordinance on first reading at its Nov. 19 meeting.

Savannah Morning News (GA)
September 25, 2009

BEST, WORST OF TIMES
LOCAL ECONOMY 'RIGHT IN SYNC' WITH REST OF STATE, NATION
Author: *ARLINDA SMITH BROADY*

Economic growth in the Savannah Metropolitan Statistical Area, which includes Chatham, Bryan and Effingham counties, significantly slowed in 2008, according to data released Thursday by the U.S. Department of Commerce's Bureau of Economic Analysis.

Out of 366 metropolitan areas, Savannah ranked 144 with a Gross Domestic Product growth rate of 0.2 percent. "These statistics suggest that the Savannah area profile is right in sync with the rest of the state and the nation," said Jeffrey Humphreys, director of the University of Georgia's Selig Center for Economic Growth. "This recession was really tough on the entire region, and recovery will be slow."

The slowdown in economic growth didn't just affect this region, data showed. About 60 percent of metropolitan areas saw economic growth slow down or reverse. Real Gross Domestic Product growth slowed in 220 of the nation's 366 metropolitan statistical areas last year, from 2 percent in 2007 to 0.8 percent in 2008.

Downturns in construction, manufacturing, finance and insurance restrained growth in many metropolitan areas, including Savannah, with government spending showing the most growth.

"No one was really surprised by the data," said **Chris Morrill**, Savannah assistant city manager. "We knew the recession hit us harder and later than a lot of areas." And although it's down from previous years, the city is doing better than the state as a whole, which saw slightly negative growth at -0.6 percent. "We're investing our very limited resources in economic growth and quality of life," **Morrill** said, "and what's a more important quality of life issue than jobs?"

Business in Savannah (GA)
September 16, 2009

CITY PROJECTS WOULD HELP DOWNTOWN MERCHANTS
Author: *ARLINDA SMITH BRODY*

During a meeting of the Downtown Business Association last week, Savannah Assistant City Manager **Chris Morrill** outlined developments designed to help the association's members and others. The first step in unifying economic development efforts was to unify the city logos, **Morrill** said. So the city commissioned a new logo based on the city squares. "It's uniquely Savannah, and it ties all the departments together," **Morrill** said. Another important step, he said, was to grow population. So the city annexed enough land to increase its area by 40 percent. "We were losing population for the past 30 years," **Morrill** said. He compared Savannah's fate to Detroit, where residents moved to the suburbs, causing the city to raise taxes to fight crime and urban blight.

Now, several plans are in the works, including developments around Ellis Square and the fort under construction in Forsyth Park. The Whitaker Street Garage, which lies beneath the square, has been in use since October 2008. To break even for operations and debt service, the garage must make $1.3 million this year, said Sean Brandon, director of the city's Mobility and Parking Department. By the end of July, revenue figures for the Whitaker Street Garage are at $766,000. "We'll probably make our projections," Brandon said. "It's feast or famine. ... Some weekends we clear as much as $10,000, and others the garage is nearly empty."

The above-ground portion promises to be people friendly. "It will be the only square with a building on it," **Morrill** said. There will be a hospitality center and permanent restrooms. One of the most fanciful features is the fountains with 12-foot water jets that can project 260 colors of LED lights. Those fountains can be turned off, and the square is wired to accommodate concerts and other forms of outdoor entertainment. It can hold about 1,000 people and will have tables and chairs instead of benches. "Benches aren't good for interaction," **Morrill** said. "We want this to be a place to gather and be with friends and family."

As for the fort at Forsyth Park, a temporary band shell will accommodate concerts, plays and other events but can be disassembled for everyday use. When the band shell isn't in use, fountains similar to ones at Ellis Square will be in place. "We envision a very family-friendly atmosphere where kids can play and parents can relax," **Morrill** said.

A restaurant leased by the Kessler Group, owner of the Mansion on Forsyth, and "the best bathrooms in town" will be another draw. These projects and others are part of the city's plan to partner with businesses to create a prosperous region. "We need to move away from the mentality that citizens and businesses are customers," **Morrill** said. "We need to work toward partnerships. The way to get out of this recession faster is to build community relationships."

Savannah Morning News (GA)
September 9, 2009

MORE CITY BUDGET CUTS COMING
AS REVENUES FOR 2010 LOOK LOWER, TEAMS OF SAVANNAH CITY EMPLOYEES PROPOSE CUTS TO SERVICES, DEPARTMENTS
Author: *LESLEY CONN*

The city of Savannah is looking at further reducing staff, merging offices and ending some services - decisions that will be made in the coming weeks to trim another $3 million in spending by the end of the year. The bleak prospect for 2010 will further spur spending cuts. City budget analysts already see a $10 million decline in general fund revenue compared to 2009, sales tax revenue remains unpredictable and property assessments that generate the bulk of city income have been ordered frozen until 2011 by the legislature.

One of the more visible city services being evaluated: Ending the Savannah-Chatham police department's mounted patrol unit. Officers would be rotated into patrol cars to fill vacancies. "We're questioning everything," said Assistant City Manager **Chris Morrill**. "If it was just about today, we'd be OK, but the problem is we don't know about revenue for the rest of the year."

A lower city revenue base, he said, is likely going to stay lower for the next 10 years, which will require the city to re-examine its spending. The city already has reduced spending by about $12 million this year to offset lower revenues. That largely has been accomplished by leaving non-essential jobs outside public safety vacant. Nearly 200 of the city's 2,600 positions are unfilled. Bret Bell, the city's director of public information, said the city is continuing to look at eliminating positions, but "we're not looking at mass layoffs."

BUILDING A BUDGET

Many of the spending cuts for the 2009 budget will be implemented immediately and will be handled as part of day-to-day operations. Others, such as a proposal to end the mounted patrol unit, have evolved as teams of city workers participating in a new budgeting process for 2010 evaluate city services. The teams are evaluating services under a variety of umbrellas, such as neighborhood vitality, public safety, health and environment, poverty reduction and economic development. City Manager Michael Brown will use their recommendations to build the city's proposed budget in October. That will be presented to City Council members, who will evaluate the proposal and can mandate changes before approving the budget in a series of public hearings. That, too, shows a lean year ahead. The proposals the teams received for city services totaled $221 million, but the projected revenue available for them equaled $214 million.

LOOKING FOR SAVINGS

Among some of the other cost-saving measures:

- A employee task force created to find savings in city mowing services identified $627,000 in cuts.

Some was achieved by notifying citizens who had "tree lawns" - grassy strips between their street and sidewalk - that the city no longer would trim them. But larger savings were found by not hiring seasonal staff, reducing mowing frequency along streets, cutting back on plantings and using in-house staff to maintain Laurel Grove Cemetery rather than fill a maintenance contract. Small outlying parcels will be contracted out, Bell said, which will cost less than hauling the city equipment as far south as Coffee Bluff to trim a small lot.

- Consolidating fire and police dispatch services by Jan. 1. The primary reason, **Morrill** said, is to improve services, but some cost-savings are anticipated.

- Merging offices and employees.

The Citizen Office, which coordinates public notices to neighborhoods during large city projects and other city initiatives, will merge with the Public Information Office.

Susan Broker, director of the Citizen Office, is filling an administrative position in the city manager's office left open since Sean Brandon, the former assistant to the city manager, became the city's director of mobility services and parking in April 2008.

Three staffers under her will move into Bell's office, and by November, the city no longer will pay rent at an office on Oglethorpe Square.

Annual savings: $15,000 in rent.

"There are talks about doubling up other offices, and even though there may not be a personnel reduction, there are reductions in rent, in office equipment and other resources," Broker said. "Basically, everyone in the city is going through their budget and looking to see what they can do without at least for the next year."

Savannah Morning News (GA)
June 19, 2009

CITY STANDS BY RIVER PROJECT

OFFICIAL SAYS $20 MILLION OBLIGATION FOR SAVANNAH RIVER LANDING STILL A 'GO' DESPITE FLAGGING ECONOMY
Author: *LESLEY CONN, 912-652-0326, lesley.conn@savannahnow.com*

The city of Savannah isn't backing away from its commitment to Savannah River Landing, even as the economy challenges the waterfront development and the city budget. At a City Council workshop session Thursday, Assistant City Manager **Chris Morrill** outlined the $20 million in road, drainage and other improvements the city will undertake. That money will come from revenue collected from a special tax allocation district established around the riverfront development.

Alderman Tony Thomas was the first to question why the city was proceeding during the uncertain economic times, especially given that from a public safety standpoint, President Street and General McIntosh Boulevard have been issues for years. He said he supports the project but added: "This raises a question for me. I've never seen us push an issue this hard."

The improvements, **Morrill** said, are about more than public safety. "Savannah River Landing cannot really have any economic development until we deal with President Street," he said.

Aldermen Van Johnson and Jeff Felser later said they believe the city is sending mixed messages about the development. "It was always my understanding of them as being mutually exclusive projects," Johnson said. "Today I got the impression they are tied together."

Savannah River Landing's developers have invested $60 million in site improvements, Finance Director Dick Evans said, and the $1.4 million in debt service the city is paying annually is still manageable and worth it to honor the private developer's investment.

The mixed-use residential/commercial and retail development has a total estimated price tag of $800 million, and it promises to redefine more than 40 acres of the waterfront just east of the Marriott Savannah Riverfront hotel. As part of the original development agreement for Savannah River Landing, the city had signed off on elevating and widening President and General McIntosh and straightening a section of McIntosh. A second phase of President Street improvements, which include building a bridge over railroad tracks, was not part of the agreement. In trying to secure federal stimulus funds for that phase, city officials emphasized its hurricane evacuation and improved safety features. "I saw no difference in the plan as it was proposed all along," Alderwoman Mary Osborne said. "That's a major development. Nobody's going to walk away from that."

The improvements along President help not only Savannah River Landing but also other planned commercial and residential developments on the south side of the road, Osborne and city officials said.

Should Ambling Cos., the developer, fail to move forward on its investment, City Manager Michael Brown said, the city would have a site with improved roads, drainage, a riverwalk and established water and sewer lines. He and other city officials said they were confident Savannah River Landing would remain viable and were confident vertical construction would begin next year, as company officials have stated.

Savannah River Landing continues to operate from trailers on the site. On Monday, the project plans to unveil a new Web site, said Kate Freeman, the company's marketing and community relations manager.

Sales efforts continue on the residential, commercial and retail front, but she said she could not disclose any information about whether any new commercial or retail clients had been signed up. "The economic times have certainly been a lesson in patience for us," she said. "But we're still committed to the original vision of the project."

Savannah Morning News (GA)
March 27, 2009

SAVANNAH TIGHTENING ITS BELT
COUNCIL TOLD BUDGET COULD BE SHORT BY $9 MILLION
Author: *LESLEY CONN, 912-652-0326, lesley.conn@savannahnow.com*

One out of every 10 city positions is going unfilled as the city of Savannah deals with declining revenues expected to total $9 million. The city has left open 250 positions and by year's end expects to have 330 positions vacant, said **Chris Morrill**, the city's assistant city manager over financial services. Those openings so far have saved the city $1.6 million. A team of city administrators reviews any job positions to determine if it needs to be filled. Only lower-level police and fire department jobs are exempt from review so that public safety needs will continue to be met. The city employs about 2,500 workers. Other teams of employees are examining key aspects of city operations to look for further cost-cutting measures, but city leaders cautioned the City Council on Thursday that the shortfall could be higher than anticipated.

One factor that could change the financial projections is any changes the state legislature may pass regarding property and sales tax collections. "Bottom line, we may need to cut $10 million to $15 million," City Manager Michael Brown said. "I hope it's not $20 (million)." Revenue reports from the first two months of the year show collections down in some key areas, **Morrill** said.

February sales taxes are down $388,000 from the same time in 2008, and hotel/motel taxes for February are down $191,432. Building inspection fees are down $169,113. Some key areas are doing better than expected. Recorder's Court fees were $142,148 above projections, and water and sewer tie-ins - an early indicator of new building - are about $100,000 above projections. In February, the city collected $600,000 in tap-in fees.

Morrill's budget presentation came during a council workshop. During council's regular session, they took the following action:

- Passed a resolution to be sent to the Georgia Department of Transportation restating the city's top priorities for transportation projects. None of the city's priority projects was included in the first round of federal stimulus projects the state selected. Their top item for the second round will be the widening and elevation of President Street, a $36 million project. Council members also asked that local congressmen and groups such as the National League of Cities get a copy as well so they could see that stimulus money was not making its way past Atlanta.

- Asked city staff to return within 60 days with recommendations for instituting a registration and card system for bartenders and servers, as well as stiffer penalties for minors who try to buy alcohol.

- Approved a contract for $1.5 million for curbs, gutters, underground storm drainage and pavement improvements in Fernwood, a neighborhood near Savannah State University. The project has been on the city's to-do list for several years.

- Granted a liquor license to the owners of Sweet Melissa's, 35 Whitaker St. Owner Denise White Pipkin agreed alcohol would be served only to dine-in customers. City officials had been worried customers would be allowed to drink and congregate outside, which would contribute to pedestrian traffic problems at the busy intersection.

Savannah Morning News (GA)
February 25, 2009

CITY PREVIEWS STIMULUS SPENDING
COUNCIL MEMBERS LIST $422 MILLION IN ELIGIBLE PROJECTS, RANGING FROM TRANSPORTATION TO JOB TRAINING AND DAY CARE
Author: *LESLEY CONN, 912-652-0326, lesley.conn@savannahnow.com*

The city of Savannah has identified $422 million in local projects and programs that could be funded under the federal stimulus package.

Entries include $50.7 million for widening and elevating the President Street Extension, $30 million to upgrade Savannah-Chatham police headquarters on Habersham Street, $182,300 for a downtown day care center and $100,000 for an electricians training institute.

Now city leaders have to determine which projects should have the highest priority - and which will have the greatest chance of being deemed worthy by the 13 federal departments that will award funding to competing projects that will pour in from across the nation.

All the projects under review are considered "shovel-ready," meaning work - and the workers who would be hired - would start quickly.

Assistant City Manager **Chris Morrill** said the city was ahead of the game because of its five-year capital improvement planning, which would drive what the city submitted. "It's a shotgun approach," he said. "Those who will be successful will be flexible ... and will be able to mold their project to fit the criteria."

Savannah Morning News (GA)
February 24, 2009

CITY, COUNTY DISPUTE JAIL BILL
SAVANNAH, CHATHAM WORK TO RESOLVE $600,000 IN CHARGES
Author: *ERIC CURL, 912-652-0312, eric.curl@savannahnow.com*

The time it takes Savannah to reimburse Chatham County for costs associated with housing jail inmates has some county officials concerned. City officials say extra time is needed to scrutinize the county's error-filled monthly bills. According to an intergovernmental agreement, Savannah is supposed to pay the county $35 per day for each inmate arrested in the city. Bills are to be sent and paid monthly, but a back and forth between the two governments regarding certain charges has delayed the process. The delays have been a recurring challenge and county officials are trying to speed up payments, said County Manager Russ Abolt. "It's money we feel we're due," Abolt said. Some county commissioners voiced concerns after no reimbursements were received after the first quarter and only a small portion of the amount budgeted had been received after the second quarter, which ended Dec. 31. Abolt attributed the delay to the time the city takes checking the bills. On average, it takes two to three months from the time the Sheriff's Department sends an initial list of jail fees until the final bill is sent, said Linda Cramer, county finance director.

A final bill for August, September and October did not get sent until January, Cramer said. Once the bill is sent, Savannah typically pays in two to three weeks, Cramer said. Savannah paid the county about $1.3 million last year for inmate housing, she said. About $404,000 has been received this year. "When we have an accurate bill, we pay it," said Assistant City Manager **Chris Morrill**. But accuracy is not typically the case, **Morrill** said.

Between 2003 - when the agreement became effective - and 2007, more than $640,000 worth of errors were discovered, Recorders Court Director Prince Johnson said in a memo regarding the issue. An average of 10 percent, or almost $10,700, worth of errors is found each month, Johnson said. Sheriff Al St Lawrence and Jail Administrator Col. McArthur Holmes said there are disagreements regarding certain charges. The city may refuse to pay for a city inmate once another jurisdiction places a hold on that inmate, Holmes said. The city should still pay the bill, he said. The day an inmate is "bound" to the courts is also commonly a matter of dispute. City officials say inmates are often classified as city prisoners when the arrest actually took place in the unincorporated county. The county has no similar complaints from the other municipalities, St Lawrence said. Other municipalities may return their rosters more quickly, but their bills consist of only a small fraction of the bookings reviewed by Savannah, Johnson said. Savannah typically reviews an average of 930 inmates and more than $100,000 in charges, while Garden City was invoiced an average of about $5,600 in charges for the first 10 months of 2008. The county proposed having the city pay an average advance each month to speed up the process. Depending on the actual expense, the city would later be credited or charged. City officials declined. The county should work on fixing the errors before the city should have to pay an incorrect bill, **Morrill** said.

Entrepreneur
August 2008

GFOA's new president-elect and executive board.(Government Finance Officers Association) (Paul A. Macklem, Catherine R. O'Connor,)

The Government Finance Officers Association is governed by an 18-member executive board, which consists of 15 members-at-large serving staggered three-year terms, the current president, the previous year's president, and the president-elect. At the association's annual meeting in June, GFOA members voted for a slate of nominees for president-elect and five new members-at-large, each of whom is profiled below.

[Note: We have included only the information for Christopher Morrill who was appointed as an at-large board member.]

CHRISTOPHER P. MORRILL

Assistant City Manager--Management and Financial Services

City of Savannah, Georgia

Chris Morrill has been a GFOA member for 17 years. He is a member of the GFOA Committee on Economic Development and Capital Planning and also served on the GFOA Committee on Governmental Budgeting and Fiscal Policy from 1994 to 1999. **Morrill** has been an instructor for various GFOA training seminars including Budgeting for Budget Analysts, Capital Budgeting, and Best Practices in Budgeting. He also reviews budgets for the GFOA's Award for Distinguished Budget Presentation Program. He has spoken on issues including economic development at GFOA annual conferences as well as at Florida and Georgia GFOA conferences. He has also written articles for the Government Finance Review.

Morrill shares his expertise internationally He was a municipal finance advisor to the South African National Treasury and a Peace Corps volunteer in public finance in Ukraine. He is a Fellow of the Kellogg National Leadership Program. In Savannah, he instituted annual five-year financial planning and five-year capital planning, reducing the tax millage rate by 27 percent in 10 years.

Savannah Morning News (GA)
July 19, 2008

CITY MULLS HIKE ON TAX REVENUE, RISING FUEL COSTS
GAS PRICES, LOWER REVENUE BEHIND SAVANNAH'S CONSIDERATION AGAINST ROLLING BACK PROPERTY TAX FOR FIRST TIME IN A DECADE
Author: *ERIC CURL, 912-652-0312, eric.curl@savannahnow.com*

High city fuel costs and less consumer spending mean some Savannah property owners will pay more in property taxes this year. City Manager Michael Brown recommended during a City Council workshop Thursday that the board not roll back the property-tax rate as it has done for the past 10 years. "We could reduce it, but there are several reasons not to," Brown said. "We're recommending you stick with what you got at the moment." Maintaining the tax rate at its current level of 12.5 mills - or $12.50 per $1,000 of assessed property value - means the owner of a $125,289 home will pay $19 more than in 2007 due to increased property value, said Assistant City Manager **Chris Morrill**.

Those same property owners would only pay $9 in additional property taxes if the tax rate was rolled back to the recommended level. Savannah officials contend the extra money is needed because the city is facing a projected $1.1 million shortfall in sales-tax revenue and about $800,000 in unexpected fuel costs. Much of the revenue decline comes from a drop in food, automobile, home and lumber sales, **Morrill** said. A larger-than-expected increase in property-tax revenue is enough to cover the difference but only if the tax rate is kept flat.

Commercial and residential properties that are not primary residences could see more of an increase because they're not protected by the Stephens-Day Homestead exemption, which essentially freezes a home's taxable value but factors in consumer price index fluxuations. There have been some positive developments during the year, **Morrill** said. Property-tax revenue is expected to increase 3 percent more than the city originally anticipated, which would bring in an extra $1.9 million. More than 60 percent of the growth in property value, about $228 million, comes from new development as opposed to reassessed values of existing property. "This is the type of growth we want," **Morrill** said. The implementation of energy savings programs in city buildings last year, such as new heating and air-conditioning controls and weatherized buildings, has resulted in a reduced power bill, **Morrill** said. "It's the first time I can remember we are actually spending less on electricity," he said. Hotel and motel tax revenue appears likely to come in even or slightly above the budgeted amount. "Savannah has been amazing the last five years," Brown said. "A lot of these (hotels) are running around with 70, 80 percent occupancy." Still, the tax rate needs to stay where it is to cope with the ongoing "recession," **Morrill** said.

Mayor Otis Johnson said he was concerned Georgia lawmakers could limit the amount of property-tax revenue the city takes in after making unsuccessful tax reform measures this past legislative season. "So I think we have to take a very conservative approach to what we do," Johnson said. "The question is will we ... get caught up in the trend of the day and want to get on the rampart and say we cut taxes. If we cut taxes, what are we going to cut in services?"

Savannah Morning News (GA)
May 1, 2008

LNG NEVER PAID FIRE FEES
SAVANNAH OFFICIALS WANT TO COLLECT MORE THAN $500,000 IN UNPAID BILLS

Author: *SCOTT M. LARSON, 912-652-0397, scott.larson@savannahnow.com*

The El Paso Corp. made more than $1 billion last year, in part from the liquefied natural gas plant it owns on Elba Island. But the company refuses to pay nearly $500,000 the city of Savannah claims the company owes in fire protection fees from the last three years, plus $178,000 due in October. "I can't imagine $178,000 to protect the community that they are located in would be a real financial hardship for the company," said Assistant City Manager **Chris Morrill**.

In fact, in its 30-year existence on the island, the multi-national corporation has never paid for fire protection.

It never has paid for the eight calls to which Savannah Fire & Emergency Services has responded since 2001. But the city still covered the plant, including a freebie on Sept. 24, 2001, to rescue four people working at the site who got trapped in a basket 80 feet in the air. Now, the plant is in the middle of a fire protection controversy. After the city went to the company about the past due bill, El Paso decided to sign a contract with Southside Fire & Emergency Services. "I'm not sure what their thinking is, but I can tell you if they want real fire protection for an industry, the city of Savannah is the only entity that can provide that level of service," **Morrill** said. "So it must be about money."

El Paso spokesman Bill Baerg would only say that Southside is a better fit, although city officials say Southside doesn't have the same capabilities. Fire aside, the plant and others like it are concerns for environmental activists and politicians alike. Area activists argue that the plant poses a serious fire and explosion threat. Liquefied natural gas is a natural gas cooled to minus-260 degrees, but it won't burn in its liquid state. Industry officials say that means it won't explode and level houses for miles as opponents claim. The Elba Island facility opened in 1978 but closed two years later. It re-opened in 2001 and has never had any incident with the 200 ships that have delivered cargo there since.

The U.S. Congress is worried about terrorists attacking liquefied natural gas ships. Last week, the House of Representatives passed a bill requiring the Coast Guard to enforce security zones around arriving tankers. El Paso's Savannah site is approved to nearly double to 15.7 billion cubic feet by 2012.

Savannah Morning News (GA)
March 26, 2008

LOGO UNITES CITY SERVICES
LOCAL DESIGN FIRM CREATES UPDATED BRANDING FOR CITY ON MODEST BUDGET
Author: *EMILY GREEN, For the* ***Savannah Morning News***

You've probably seen it around town. The subtly scripted "Savannah" prominently placed in black beside a tilted, abstract version of the city's historic green squares. The city of Savannah's new logo is gradually showing up on everything from maintenance vehicles and parking meter receipts to letterhead and envelopes. "It was important that the design be timeless, not trendy, so it would not go out of style," **Morrill** said. "This should be a viable design for decades."

Don't let the simplicity of the logo fool you into thinking it is just another pretty design.

Months of research and proposed sketches by local design firm brightwhitespace, partnered with an identity design committee made up of city employees, went into the production and implementation of the updated logo, now visible all around Savannah.

IDENTITY CRISIS

The plan for rebranding the city of Savannah's image began during a conversation concerning the more than 40 individual logos that represented various service departments. Film Commissioner Jay Self and Assistant City Manager **Chris Morrill** discussed a need for one unifying look to represent the city as a single entity and thus began the initial stages of rebranding.

The many existing department logos were not coherent or recognizable as part of the city of Savannah. Some didn't even represent the intended service to the public, creating potential confusion for citizens wondering which services their tax dollars supported.

"We have thousands of employees, thousands of vehicles out there doing work all day and people don't think about them all being the city of Savannah," Self said.

THEY GET SAVANNAH

The city hired Ariel Janzen and Rigel Crockett of brightwhitespace to work on the project in stages. Their previous experience with identities for the Liberty Parking Shuttle and Tourism and Film Department provided some established trust, but more importantly, the committee chose the local firm because they "get" Savannah.

"There's so much about Savannah that's so subtle," **Morrill** said. "You really have to live here to get it. Having a local company rather than some big national firm come in was important to the process."

From studies and surveys to sketches with various colors, typography and imagery, the two teams collaborated throughout the process.

PLACE BRANDING

"With so much competition for businesses, for visitors, you have to put out a positive image," **Morrill** said. "You have to put out an image that says 'we have our act together.' "

Janzen and Crockett researched other cities with successful rebranding and conducted surveys with Savannah residents, which they used to help compile a list of identity requirements, design specifications and branding goals with the committee.

"As with any identity problem, the challenge was one of perception," Crockett said. "Many city employees did not feel good about their outdated 1950s-style, institutional business cards. Additionally, because each of the city's departments had a unique logo, citizens were not always able to identify which services the city was actually delivering."

WHAT'S IN A NAME

"We realized that the word 'Savannah' itself has a very positive message in it," Self said. "It's a beautiful name to visitors and to locals alike. Instead of minimizing that, the word 'Savannah' is in the center of the logo."

Deciding on an accompanying icon proved more taxing than choosing the main part of the logo. After considering numerous icons, the committee selected one of the city squares tipped on point because of its messages. The committee realized Savannah means different things to different people, however, the one thing unique to the city when compared to others is the public city squares.

"The central core of the Oglethorpe plan and the ward is the square, the open space, the green space, the sense of public," **Morrill** said. "For us it's the simplicity of the symbol and the allusion to the public city squares," Crockett said. "This is important because the square not only represents Savannah's beauty and livability, but it reminds us that the city has always been responsible for their care."

The official design brief explained that the shading of the city square "creates a positive forward motion." The use of green does justice to the countless parks and trees while emphasizing an environmental focus, and the feminine serif font of "Savannah" captures the welcoming spirit. "Even though the symbol is kind of a downtown symbol, those values radiate throughout our community," Self said, "not only in public land planning and public spacing but also with access and involvement."

A SOFT ROLLOUT

The city purposely did not plan an official unveiling of the new logo mainly with the taxpayers' best interest in mind. Instead, it opted for a soft rollout, which means using up supplies that contained the old logos and waiting until vehicles are replaced. From start to finish the rebranding cost totaled just less than $25,000, a cost virtually unheard of in most rebranding projects.

"We wanted to roll it out more organically so that people would subtly discover it," **Morrill** said. "Externally, the whole rebranding as an organization shows that we're one organization, we have core values that we work toward."

Public safety services such as the police and fire departments were not required to switch to the new logo because of their widely recognized existing logos. Appointed city officials such as the mayor and legal counsel will continue to use the more formal historic seal.

Brightwhitespace created a 42-page stylebook with specific guidelines for city employees to use in order to avoid relying on outside vendors for printing. The stylebook contains color variations of the logo in files formatted for Web and print and lists suggestions on how to use the graphics. With city employees having access to the files, they can print on an as-need basis instead of having to order in bulk.

"We thought there would be a lot of push back (internally) because it's difficult to implement change in any organization," Self said. "But to my knowledge it has been universally accepted because we rolled it out in a way for our people that made it as easy as possible for them to embrace it."

Augusta Chronicle, The (GA)
August 20, 2004

PROPOSAL BENEFITS TOURISM GATEWAY
Author: *Scott M. Larson and Mary Carr Mayle, Morris News Service*

SAVANNAH, Ga. - The tourist boulevard along Savannah's quaint River Street will expand soon with the construction of a $570 million mixed-use development that city officials say will transform a chunk of land - next door to downtown Savannah - that resembles a wasteland.

"If you look at it right now as you drive in, it's one of the gateways to Savannah, and it's ugly looking," said Assistant City Manager **Chris Morrill**. "There are not many large sites in the city so close to downtown where you could really do a quality development that could extend the Historic District."

In the past, the site has scared off developers because of extremely poor drainage.

City officials said that, in the past couple of years, six or seven developers have met with the city about the property but couldn't make anything work.

Mr. **Morrill** and John Hutton, the city's acting inspections director, are more optimistic about this proposal because three developers, including a group building a mall just to the south, are working together to address the big issues, such as drainage.

"All of a sudden, you are looking at doing something for one-third of the cost," Mr. Hutton said.

Savannah Morning News (GA)
October 15, 2002

SAVANNAH OFFICIALS TO STAY IN INDONESIA
THREE CITY EMPLOYEES TO CONTINUE GOODWILL VISIT DESPITE VIOLENCE.
Author: ***Savannah Morning News***

Friday, three Savannah city officials departed for Indonesia on a goodwill mission to offer their expertise to a sister city across the globe.

The next day, while the group was in midflight, a bomb exploded in a Bali nightclub.
Sunday, the Savannah trio landed in Indonesia as thousands of Westerners attempted to flee the island nation.

The three - acting Revenue Director Buddy Clay; Development Services Administrator John Hutton; and Public Development Coordinator Cindy Boyette - were given the option of returning, but decided to stay, despite a U.S. embassy order evacuating all nonessential personnel.

The city they are visiting, Yogyakarta, is located on the main island, they reasoned, and they are being accompanied at most times by Indonesian security. As an extra precaution, they have canceled planned media events to lower their visibility.

"They feel safe and they are going to stay," said Assistant City Manager **Chris Morrill**. "If the situation changes, we will get them out quickly." **Morrill**, City Manager Michael Brown and Finance Director Richard Evans visited Yogyakarta in March to establish the sister-city partnership as part of a program funded by the International City/County Managers Association. Hutton, Clay and Boyette will spend the week helping Yogyakarta improve its revenue system and inspections process.

Savannah Morning News (GA)
September 13, 2002

LOST SOLUTION MAY BE FOUND
NEGOTIATORS TENTATIVELY AGREE HOW TO SPLIT ABOUT $45 MILLION A YEAR, BUT THE COUNTY COULD BLOCK THE PLAN TODAY.
Author: *Jennifer Moroz,* ***Savannah Morning News***

After months of bitter back-and-forth, negotiators for Chatham County and eight municipalities have reached a tentative agreement on how to split up millions of dollars in sales-tax revenue. Under the proposed distribution of the Local Option Sales Tax (LOST), the cash-strapped county would get about $2.3 million a year more than it does under the current arrangement. County Commission Chairman Billy Hair and representatives of the municipalities, including Savannah, agreed the deal was a fair compromise. But some county commissioners say that it does not go far enough, and their voices count: The proposal needs the stamp of the majority on the nine-member commission to become final.

The commission is expected to consider the matter at its regularly scheduled meeting this morning. Pooler Mayor Buddy Carter was confident: "We've got five votes lined up." County Commissioner Frank Murray, one of two designated negotiators for the county, wasn't so certain.

"I don't think it's an offer that has the support to pass," he said.

Murray himself is against the proposal, which was hammered out over the last few days between Hair and Savannah Mayor Floyd Adams Jr. Representatives of the other seven municipalities, which have teamed up with Savannah in the negotiations, have signaled their approval. "I think we're getting close," Murray said, "but I don't feel the offer is where it needs to be right now."

Proceeds from the 1-percent sales tax represent a major source of revenue for local governments, which use the money to fund services - and lessen the property-tax burden on homeowners.
Over the next 10 years, the tax is expected to generate about $500 million. About 35 percent, or $175 million, of that comes from tourist spending. The proceeds are divided based on a number of criteria, including population, level of services provided by each government, and where the tax is generated. The first split is between the county and the municipalities as a group; the municipalities then decide how to divvy up their share. Under the current distribution formula, negotiated in 1995, the county gets 19.22 percent of the annual proceeds - about $8.3 million last year. Savannah gets the bulk at 68.73 percent - about $30 million last year. Over the last three months, county officials have argued that they have lost millions a year as a result of the 1995 deal, when they picked up the cost of housing municipal prisoners in return for a slightly larger piece of the sales-tax pie.

Commissioners, who just finished closing an $11.7 million hole in the county's operations budget, have blamed a large part of the county's ongoing financial woes on the prisoner issue.

Municipal officials countered that the county has overestimated its losses, using faulty figures to calculate prisoner costs.

Under the proposed new agreement, the county would get 17.6 percent of the sales-tax revenue - an amount equal to about $7.9 million next year. It would charge the municipalities $30 a day for each municipal prisoner housed in the county jail. The county would pay for municipal prisoners not yet bound over to the state court system after 28 days.

County officials estimate those prisoner fees will bring in an extra $2.7 million a year. "I think we've come to an agreement we can all live with," said Garden City administrator Tom Gates. "We tried to do what was fair and right and protect the tax to make sure it continues to exist." If an agreement is not finalized by Dec. 30, the tax expires. Up until last week, negotiations appeared deadlocked.

County officials had originally been asking for 18.6 percent of the tax proceeds, plus $45 a day for each municipal prisoner.

City negotiators in return offered the county a 15.51 percent cut of the sales-tax pie, with no help to maintain the county jail.

Savannah Assistant City Manager **Chris Morrill** said the proposed deal was especially sweet for the county. "They started at 18.6 percent and $45 (a day per prisoner) and look where this agreement is," **Morrill** said. "This is a good deal for them." The city, which last year got about $30 million of the proceeds and didn't have to pay to house its prisoners, would lose about $600,000 a year. **Morrill** said he did not yet know how officials would make up the lost revenue.

If county commissioners ratify the agreement, the municipalities would decide how to divide the remainder of the sales-tax proceeds. That division is usually based on population, which would give Savannah 67.37 percent, or about $30.3 million next year. Bloomingdale would get 1.37 percent; Garden City 5.78 percent; Pooler 3.2 percent; Port Wentworth 1.68 percent; Thunderbolt 1.2 percent; Tybee Island 1.74 percent; and Vernonburg .07 percent.

Savannah Morning News (GA)
February 1, 2002

SAVANNAH AGREES TO IMPROVE ACCESS
SETTLEMENT WITH JUSTICE DEPT. COMES ALMOST 2 YEARS AFTER AUDIT FOR COMPLIANCE WITH ADA
Author: *Kate Wiltrout*

Navigating Savannah's streets - and its bureaucracy - will soon get a little easier for disabled people. The city is one of 21 state and local governments that settled Wednesday with the U.S. Department of Justice regarding compliance with the Americans with Disabilities Act. Now almost 10 years old, the act requires that public facilities be made accessible to all people.

Chris Morrill, an assistant Savannah city manager, said the 11-point agreement should take about two years to complete. He estimated it would cost about $300,000, and that money would be found in the budget for the improvements.

Some of the changes are easier than others. For instance, all letters sent from city offices will have a central TTY telephone number on them, so hearing-impaired residents can contact the city.

City Council chambers will be fitted with listening systems for the hard-of-hearing, as will Grayson Stadium and the Martin Luther King Jr. Arena at the Civic Center.

Others are more labor intensive. The city agreed to physical modifications so that "parking, routes into buildings, entrances, doors, elevators, signage, public telephones, restrooms, dressing rooms, locker rooms, service counters, drinking fountains and swimming pools are accessible to people with disabilities."

Carol Bell, Central Services director, said the city would go beyond what's required.

"We don't really have any qualms with the agreement," she said. City Hall will get one wheel-chair accessible bathroom, though it was technically compliant already, with bathrooms in the nearby hospitality center on River Street, said city architect Thomas Perdue.

"God only knows whether the original City Hall even had bathrooms," Perdue said. "The city occupies a lot of buildings that are very historic and very old, and most of those are the ones we have problems with."

Savannah Morning News (GA)
November 13, 2001

NEW ASSISTANT CITY MANAGER ALL OVER THE MAP
Author: *Kate Wiltrout*

Chris Morrill started his job as assistant city manager for management and financial services in August. The position is new to him - but City Hall isn't. Before spending two years in South Africa working for the U.S. Agency for International Development, **Morrill** was Savannah's research and budget director for seven years. That job was interrupted with a two-year Peace Corps gig in Ukraine, where he advised the city of Lviv on finance, management and privatization issues. **Morrill**, who works out of an office in the top corner of City Hall, filled the spot left when Bob Bartolotta moved last October.

Here's what **Morrill** had to say during a break from last week's budget workshops:

What are some of your goals as an assistant city manager?

"First, to ensure that our city employees are well-trained, that they have a good work environment and they have the support services (they need). ... Next is to maintain the city's strong financial foundation, particularly through a possible recession."

He also wants to improve the city's use of technology, both for services and to get information out to citizens. Another top priority is getting citizens more engaged with local government.

How has your work overseas affected your views about local government?

"In the Peace Corps (in Ukraine), I experienced government at its worst, where it's designed to control and keep track of people rather than provide services. It really makes me want to focus on the positive role government can play. In South Africa, post-apartheid, it was seeing that to really have democracy you have to have citizen involvement. It impressed me how diligent they were at that."

How do you think Savannah changed while you were in Africa the past two years?

"I think what I saw coming back was a lot more economic development, downtown and in the neighborhoods. Areas like off East Broad Street that I thought were hopeless have all of a sudden come back. ... I personally have seen a much greater police presence in my own neighborhood (Ardsley Park), and the city seems a bit cleaner."

What can Savannah residents expect if the economy goes into a prolonged recession?
"If the recession is longer term and systemic, then we really need to look at prioritizing the services we provide and actively look at our revenue sources. I think an increase in property tax would probably be a last resort."

Savannah Morning News (GA)
June 8, 2001

SAVANNAH HIRES NEW ASSISTANT CITY MANAGER
Author: *Bret Bell*

Chris Morrill has spent much of the past five years helping to privatize the Ukraine and create a new financial framework for local governments in post-apartheid South Africa.

With that kind of background, City Manager Michael Brown figures he will have little trouble coming up with a budget for little old Savannah. Brown announced Thursday that he hired **Morrill**, who helped create annual budgets for the city of Savannah for the better part of a decade, as assistant city manager for management and financial services.

Considered one of the top three most powerful positions in city government, **Morrill** fills a position that had remained vacant since October, when Bob Bartolotta left to run the city of Jupiter, Fla. Finance Director Richard Evans served as assistant city manager in the interim.

Morrill will start work Aug. 13 with a $98,000 annual salary.

While working for the city from 1990-1992, and again, from 1994-1999, **Morrill** led an eight-member team that prepared and monitored a $170 million budget.

"Chris made many improvements in our budget and financial management systems, as well as in the quality and clarity of our presentation and public information materials," Brown said.

In his new position, **Morrill** will oversee 10 city departments, including vehicle maintenance, finance, human resources, purchasing, central services and parking services.

Bartolotta drew some heat from city employees during his tenure when Vehicle Maintenance Department employees claimed abuse and unsafe working conditions. The department's director later resigned during a city investigation.

Some of those worker complaints led to the unionization of service employees earlier this year.

CHRIS MORRILL'S RESUME

WORK HISTORY
1999-present: senior municipal policy adviser for the National Treasury of South Africa -- United States Agency for International Development

1990-1992, 1994-1999: research and budget director, city of Savannah

1997-2000: fellow, Kellogg National Leadership Program -- studied community building in countries throughout the world

1992-1994: Peace Corps volunteer -- advised the city of Lviv, Ukraine, on finance, management and privatization issues

1988-1990: senior management analyst, city of Savannah

1986-1988: senior budget analyst, Catawba County, N.C.

1984-1985: downtown project manager, Lynn, Mass.

EDUCATION

Master of Public Administration, 1987 -- University of North Carolina, Chapel Hill

Bachelor of Arts, 1984, political science major -- College of the Holy Cross, Worcester, Mass.

Certificate in county administration, certificate in budgeting and financial planning -- North Carolina Institute of Government

Columbus Ledger-Enquirer (GA)
October 14, 1996

GEORGIA BRIEFS
Author: *From wire reports*

City to be compensated for Olympic security costs

SAVANNAH -- Savannah will receive $57,308 from the Legislature to compensate for nonpersonnel security costs incurred during Olympic yachting events.

``The request was passed by the state legislature earlier on, and the governor's office gave it final approval late last week," said state Rep. Tom Bordeaux, D-Savannah. ``The city is getting everything it asked for, which is a good sign for Savannah and its planning department."

The money is coming from a $500,000 governor's discretionary grant fund approved by the Legislature so cities hosting satellite Olympic venues -- such as Savannah with yachting or Columbus with softball -- could be compensated for security costs.

Savannah's budget director, **Chris Morrill**, said the money is welcome, even though all Olympic costs are already covered by the city's $88.5 million general fund budget for 1996.

``It's like getting a bonus at work -- you don't go out and spend it right away," **Morrill** said.

ACOG already paid Savannah $290,000 to help defray police overtime in a deal negotiated earlier this year by Mayor Floyd Adams Jr. The city still incurred an additional $244,000 in police overtime during the Games, although all of it was budgeted by city officials.

Savannah requested compensation for computers, police vehicle maintenance, bulletproof vests and extra barricades and other items needed around the venues.

Research Completed by: Vanessa Garner
Colin Baenziger & Associates

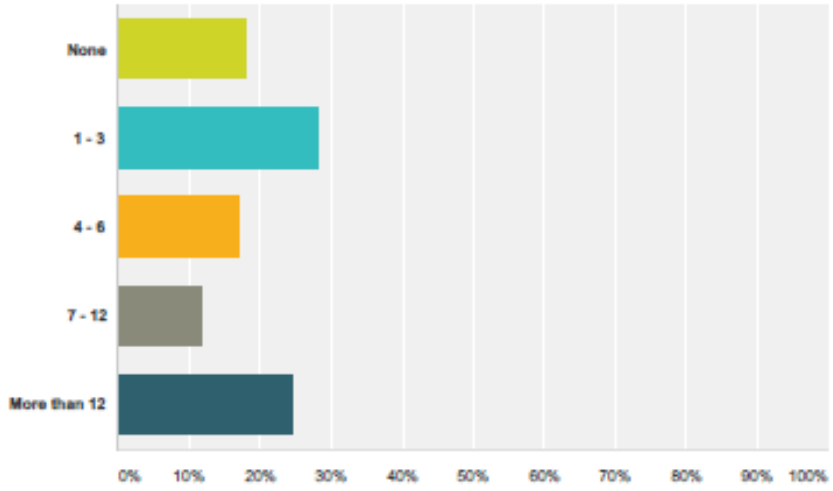
Appendix D

Sample Survey
Savannah City Manager Quality Survey

Sample City Manager Quality Survey

Q1 During the past three years, how often have you attended or viewed a city council or city commission meeting (select only one)

Answered: 449 Skipped: 1

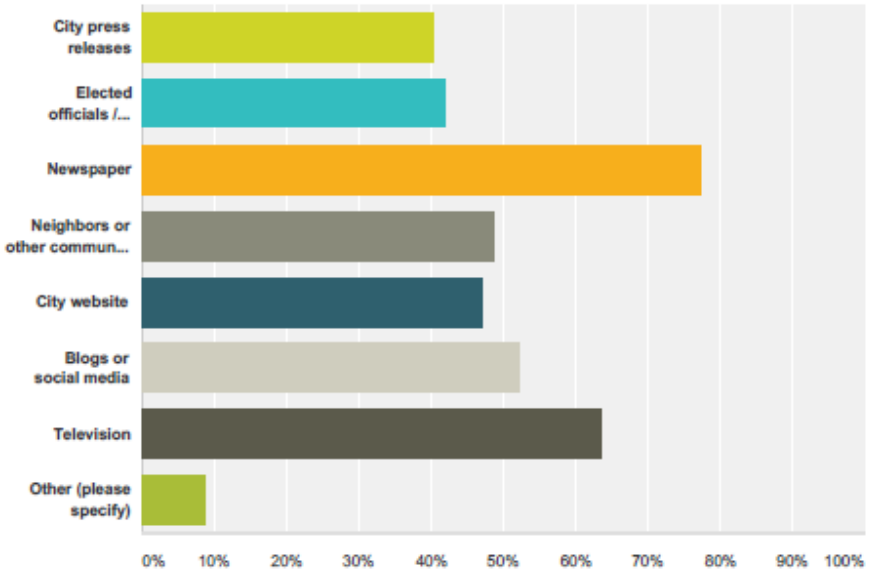


Answer Choices	Responses	
None	18.26%	82
1 - 3	28.29%	127
4 - 6	16.93%	76
7 - 12	11.80%	53
More than 12	24.72%	111
Total		449

Savannah City Manager Quality Survey SurveyMonkey

Q2 How do you keep informed of City issues and concerns (select all that apply)

Answered: 450 Skipped: 0

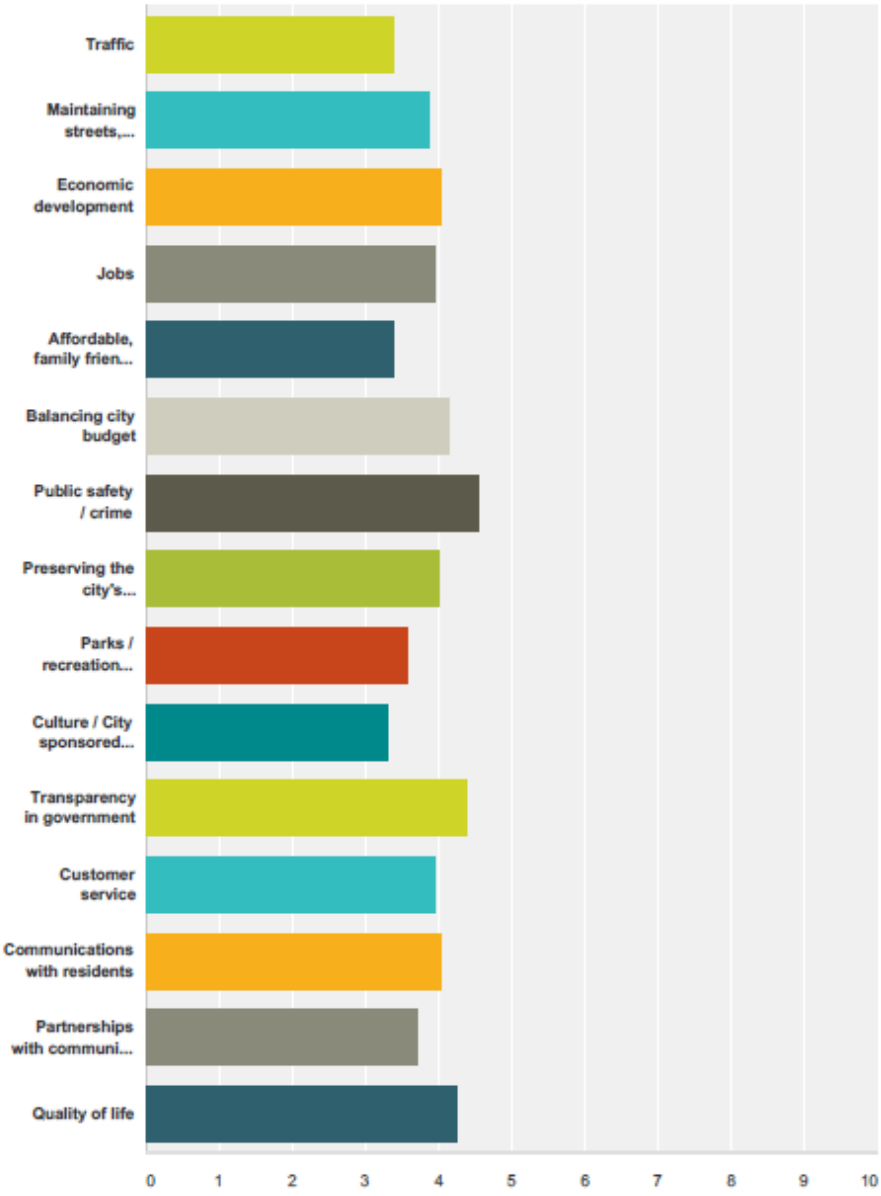


Answer Choices	Responses	
City press releases	40.22%	181
Elected officials / city staff	42.00%	189
Newspaper	77.56%	349
Neighbors or other community members	48.67%	219
City website	47.11%	212
Blogs or social media	52.22%	235
Television	63.78%	287
Other (please specify)	8.67%	39
Total Respondents: 450		

Savannah City Manager Quality Survey SurveyMonkey

Q3 Please rank each of the following issues that the City Manager should address (5 being the most important and 1 as not important)

Answered: 448 Skipped: 2



Sample City Manager Quality Survey (continued)

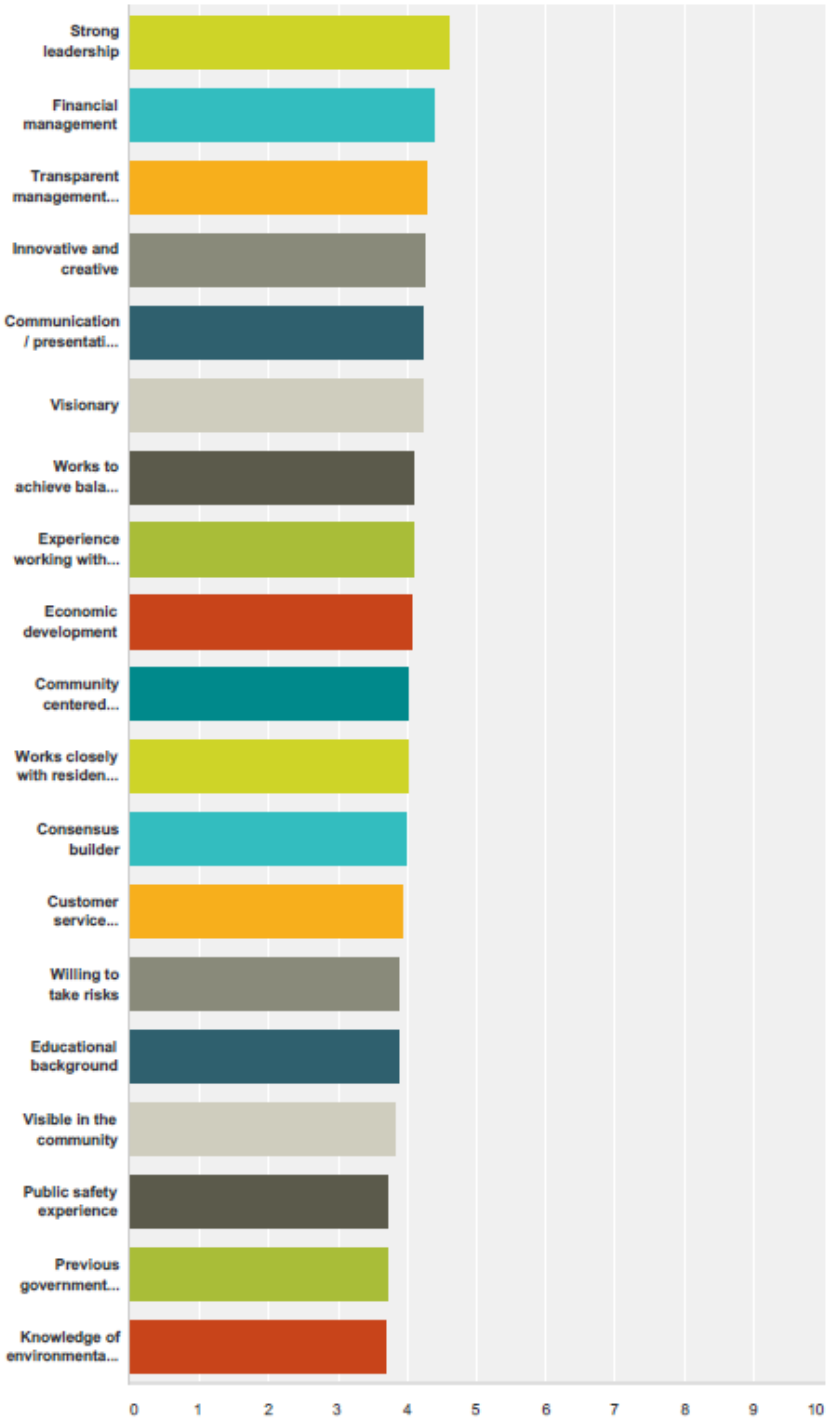
Savannah City Manager Quality Survey — SurveyMonkey

Traffic	**6.59%** 28	**12.47%** 53	**35.06%** 149	**24.00%** 102	**21.41%** 91	**0.47%** 2	425	3.41
Maintaining streets, buildings, and other public facilities	**2.30%** 10	**7.36%** 32	**23.22%** 101	**33.79%** 147	**32.64%** 142	**0.69%** 3	435	3.88
Economic development	**6.19%** 27	**6.42%** 28	**13.76%** 60	**22.25%** 97	**48.85%** 213	**2.52%** 11	436	4.04
Jobs	**5.61%** 24	**7.71%** 33	**16.82%** 72	**22.66%** 97	**44.86%** 192	**2.34%** 10	428	3.96
Affordable, family friendly housing	**10.39%** 45	**13.39%** 58	**28.41%** 123	**19.40%** 84	**27.48%** 119	**0.92%** 4	433	3.41
Balancing city budget	**3.63%** 16	**5.22%** 23	**13.83%** 61	**27.89%** 123	**47.62%** 210	**1.81%** 8	441	4.13
Public safety / crime	**3.83%** 17	**2.03%** 9	**5.63%** 25	**10.36%** 46	**74.77%** 332	**3.38%** 15	444	4.55
Preserving the city's character	**5.68%** 25	**5.68%** 25	**17.50%** 77	**23.41%** 103	**46.36%** 204	**1.36%** 6	440	4.00
Parks / recreation programs	**3.90%** 17	**7.57%** 33	**33.94%** 148	**32.11%** 140	**21.56%** 94	**0.92%** 4	436	3.60
Culture / City sponsored events	**7.74%** 34	**12.98%** 57	**35.99%** 158	**28.02%** 123	**14.81%** 65	**0.46%** 2	439	3.29
Transparency in government	**3.61%** 16	**2.71%** 12	**10.84%** 48	**14.67%** 65	**65.24%** 289	**2.93%** 13	443	4.39
Customer service	**4.52%** 20	**6.79%** 30	**20.59%** 91	**24.89%** 110	**42.31%** 187	**0.90%** 4	442	3.95
Communications with residents	**4.31%** 19	**4.76%** 21	**18.37%** 81	**26.53%** 117	**44.90%** 198	**1.13%** 5	441	4.04
Partnerships with community / schools / business	**8.18%** 36	**8.41%** 37	**22.50%** 99	**24.32%** 107	**35.68%** 157	**0.91%** 4	440	3.72
Quality of life	**4.56%** 20	**2.96%** 13	**12.07%** 53	**20.96%** 92	**56.72%** 249	**2.73%** 12	439	4.26

Savannah City Manager Quality Survey SurveyMonkey

Q4 Please rank each of the following skills the next City Manager should have (5 being the most important and 1 as not important)

Answered: 449 Skipped: 1



Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey — SurveyMonkey

	1	2	3	4	5	N/A	Total	Weighted Average
Strong leadership	4.51% 20	1.13% 5	3.39% 15	10.61% 47	79.01% 350	1.35% 6	443	4.61
Financial management	3.38% 15	3.15% 14	8.33% 37	20.72% 92	63.06% 280	1.35% 6	444	4.39
Transparent management style	3.83% 17	2.25% 10	13.06% 58	20.50% 91	58.78% 261	1.58% 7	444	4.30
Innovative and creative	4.10% 18	2.28% 10	14.81% 65	20.27% 89	57.86% 254	0.68% 3	439	4.26
Communication / presentation skills	3.62% 16	3.39% 15	13.12% 58	25.57% 113	53.62% 237	0.68% 3	442	4.23
Visionary	5.22% 23	2.95% 13	12.70% 56	20.63% 91	57.37% 253	1.13% 5	441	4.23
Works to achieve balance among all community interests: residents, businesses and developers	2.95% 13	6.35% 28	15.19% 67	26.98% 119	47.39% 209	1.13% 5	441	4.11
Experience working with diverse communities	6.07% 27	5.39% 24	14.16% 63	21.12% 94	52.36% 233	0.90% 4	445	4.09
Economic development	4.57% 20	5.25% 23	14.16% 62	28.54% 125	45.89% 201	1.60% 7	438	4.06
Community centered approach	4.78% 21	5.01% 22	17.31% 76	27.56% 121	44.65% 196	0.68% 3	439	4.03
Works closely with residents and seeks their viewpoint	4.08% 18	4.31% 19	17.46% 77	31.75% 140	41.72% 184	0.68% 3	441	4.03
Consensus builder	4.31% 19	6.12% 27	20.63% 91	24.04% 106	43.54% 192	1.36% 6	441	3.98
Customer service orientation	5.24% 23	5.92% 26	18.00% 79	28.93% 127	41.00% 180	0.91% 4	439	3.95
Willing to take risks	5.25% 23	5.02% 22	23.74% 104	26.26% 115	38.81% 170	0.91% 4	438	3.89
Educational background	3.64% 16	7.05% 31	22.95% 101	27.05% 119	37.27% 164	2.05% 9	440	3.89
Visible in the community	4.58% 20	7.09% 31	24.71% 108	26.32% 115	36.61% 160	0.69% 3	437	3.84
Public safety experience	4.49% 20	8.31% 37	26.97% 120	27.42% 122	31.69% 141	1.12% 5	445	3.74
Previous government experience	8.07% 36	7.17% 32	24.22% 108	23.54% 105	35.43% 158	1.57% 7	446	3.72
Knowledge of environmental issues	7.06% 31	8.43% 37	25.28% 111	24.83% 109	33.26% 146	1.14% 5	439	3.70

Sample City Manager Quality Survey (continued)

Q5 Is there anything else you want to share about what you would like to see in our next City Manager?

Answered: 230 Skipped: 220

Put the NEEDS of residents of the City of Savannah FIRST! Before the tourists, the business developers, etc.
A dedication to addressing the gun violence in our city.
More visibility to the community as a whole including the unincorporated areas, not just to specific groups.
Interest in building a bike and pedestrian friendly city.
A major interest in the environment and sustainability of it.
A familiarity with and support for Complete Streets.
Good working relationship with citizens and police. Ability to work to preserve neighborhoods. Savannah is not just for tourists!
Highly ethical business practices. High moral values and integrity. Verifiable track record of previous accomplishments in government or business.
Increasing mobility using plans like "Complete Streets". Making public transportation available for all in getting around the city (shuttles); making it safe for biking; better recycling agenda (they're composting in San Francisco these days).
I'd like to see the City Manager riding his bike to work or walking to work and incorporate a plan to always include sidewalks and bike paths in infrastructure for existing and especially for new development.
Someone who will place traffic calming and safe streets as a top priority. We have virtually no traffic enforcement (60 mph on E 52nd, my street, is not uncommon and there is NO police enforcement).
We need to start making Savannah A Bike City friendly and make better changes for cyclists safety , so that we won't have another horrible accident like on BRAG again.
Commitment to transportation issues in traffic calming through downtown for pedestrians, bicycles, cars (speeding) and public transportation. Too many accidents, by any of these modes of transportation, are completely avoidable or at least able to be lessened by enforcement of existing laws or the development of prevention measures.
Focus on the planning, development and maintenance of complete streets.
Previous experience in a city with similar challenges would be ideal, along with a demonstrated ability to manage large public projects from start to finish.
He or she must be someone the city staff will respect and find good to work for. I guess this is having the skills that most employees like to see in their employer. The new City Manager should also have skills in delegating responsibility and giving credit to others for their successes.

*16 samples responses from the 230 received.

Appendix E

St. Johns County, FL Resolution Thanking CB&A for Its Outstanding Service

RESOLUTION NO. 2007-231

A RESOLUTION OF THE COUNTY COMMISSION OF ST. JOHNS COUNTY, FLORIDA, THANKING COLIN BAENZIGER & ASSOCIATES FOR ITS OUTSTANDING EFFORTS IN CONDUCTING THE EXECUTIVE SEARCH FOR THE COUNTY'S NEW ADMINISTRATOR; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, St. Johns County retained Colin Baenziger & Associates (CB&A) to identify and recommend strong candidates to be the County Administrator;

WHEREAS, CB&A's staff worked diligently to find and produce excellent candidates, and then provided the County Commission with comprehensive materials concerning the candidates' aptitude, experience, background, complete and thorough interviews, references, extensive checks of criminal, civil and financial history, verification of employment and education, and exhaustive reviews of Internet and newspaper archives of these candidates; and

WHEREAS, CB&A's process was completely open, fair and unbiased and was extremely well received by the County Commission, county staff, the press, and the public; and

WHEREAS, the County Commission wishes to express its gratitude to Colin Baenziger & Associates for its efforts on behalf of the county;

NOW BE IT THEREFORE RESOLVED BY THE COUNTY COMMISSION OF ST. JOHNS COUNTY, FLORIDA AS FOLLOWS:

Section 1: Recitals. The preceding recitals are true and correct and are incorporated herein by this reference.

Section 2: Acknowledgement. The County Commission wishes to express its sincere appreciation and gratitude to Colin Baenziger & Associates for its outstanding work and effort in assisting the county in finding its County Administrator.

Section 3: Effective Date. This resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED by the Board of County Commissioners of St. Johns County, Florida, this 21 day of August, 2007.

ATTEST: Cheryl Strickland, Clerk

By: Pam Hatterman
Deputy Clerk

BOARD OF COUNTY COMMISSIONERS
ST. JOHNS COUNTY, FLORIDA

By: Ben Rich
Ben Rich, Chairman

Rendition Date: 8/23/07

Appendix F

Comments from Dale Martin on CB&A's Vetting Process

Fernandina Observer™
A JOURNAL OF NEWS AND OPINION

Weekly comments from Dale Martin

By Dale Martin, City Manager, City of Fernandina Beach
March 18, 2016 1:00 a.m.

The vetting process employed by Mr. Colin Baenziger following my application to the City of Fernandina Beach was the most thorough review of my career, credentials, and references that I have ever experienced. In the months leading to my appointment here, I was interviewed in several other communities for similar City Manager positions. Despite getting to the interview stage in those communities, none of my references ever indicated to me that they had been contacted. As part of the selection process here, I was required to provide an exhaustive list of references, some very specific, such as my current Town Attorney, auditor, Chamber of Commerce, etc. To the best of my knowledge, every single reference provided was contacted.

The historic information provided to the City Commission for each candidate was extensive. Reading through the older newspaper articles rekindled so many memories- the personalities and issues from earlier days illustrate some peaks and valleys over the past twenty years. It has been a wonderful ride.

Note: Mr. Martin reminisces about his career for the remainder of the article. The full article can be found at:

http://fernandinaobserver.com/2016/03/18/weekly-comments-from-dale-martin-5/#more-65218

PROPOSAL FOR EXECUTIVE RECRUITMENT SERVICES

CITY ADMINISTRATOR
POLICE CHIEF
ASSISTANT PUBLIC WORKS DIRECTOR

CITY OF ISLE OF PALMS

May 2018

Strategic Government Resources

Ron Holifield, CEO
P.O. Box 1642
Keller, Texas 76244
214-676-1691
Ron@GovernmentResource.com

May 4, 2018

Mayor Jimmy Carroll
Council Member Sandy Ferencz
City of Isle of Palms
1207 Palm Boulevard
Isle of Palms, SC 29451

Dear Mayor Carroll and Council Member Ferencz:

Thank you for the opportunity to submit this proposal to assist the City of Isle of Palms in your City Administrator, Police Chief, and Assistant Public Works Director recruitments.

SGR is one of the top three local government executive recruitment firms in the nation and has the unique ability to provide a personalized and comprehensive recruitment to meet your needs.

I would like to draw your attention to a few key items that distinguish SGR from other recruitment firms:

- SGR has over 60,000 email subscribers to my weekly "10 in 10 Update on Leadership and Innovation" e-newsletter.
- SGR will send targeted emails to our opt-in subscribers of over 3,900 city management officials, over 15,000 law enforcement professionals, and over 3,900 public works and engineering professionals.
- SGR's website, where this position would be posted, receives over 36,000 local government official visitors each month, with over 75,000 page hits per month – more than any other local government search firm website in the nation.
- SGR's job board (a separate website), where this position would also be posted, is the 2nd largest local government job board in the nation, with over 16,000 local government job seeker visitors each month, and over 1,800 jobs listed at any given time.
- SGR is the only search firm with a social media expert on staff, who provides a comprehensive social media marketing campaign that includes email, Facebook, Twitter, Instagram, and LinkedIn.
- Kurt Hodgen, the proposed recruiter for these searches, is a retired city manager and resides in Mooresville, North Carolina, which is less than four hours from Isle of Palms. He is familiar with the Carolinas and will be readily available to meet with you as needed throughout the search process.

No other firm can touch our reputation for being trusted by both clients and candidates, and for successful long-term placements. We are truly excited about the prospect of working with the City of Isle of Palms. I look forward to discussing in more detail how we can assist you with these recruitments, and we are available to visit in person with you at your convenience.

Respectfully submitted,

Ron Holifield, Chief Executive Officer
Strategic Government Resources
Ron@GovernmentResource.com
Cell: 214-676-1691

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TAB 1

Company Contact Information

Strategic Government Resources

Contact Information for Binding Official / Primary Contact

Chuck Sparks, Chief Operating Officer

Address: P.O. Box 1642, Keller, TX 76244
Office: 817-337-8581
Fax: 817-796-1228
Email: ChuckSparks@GovernmentResource.com
Website: www.governmentresource.com

Alternate Contact

Ron Holifield, Chief Executive Officer

Address: P.O. Box 1642, Keller, TX 76244
Cell: 214-676-1691
Office: 817-337-8581
Fax: 817-796-1228
Email: Ron@GovernmentResource.com
Website: www.governmentresource.com

TAB 2

COMPANY PROFILE

Background
Strategic Government Resources (SGR) was founded in 1999 and is fully owned by former City Manager Ron Holifield. Ron spent two high-profile decades in city management, which included service as City Manager in several cities. He founded SGR for the express purpose of helping local governments be more successful by recruiting, assessing, and developing innovative, collaborative, authentic leaders. We specialize in executive recruitment, live training, online training, leadership development, assessments, consulting, and various other services geared to promote innovation in local governments.

Mission & Core Values
SGR's mission is to facilitate innovative leadership in local government. The simple fact is that in today's world of limited resources, local governments must innovate to survive. SGR has been, and continues to be, a leader in spurring innovation in local government.

SGR's core values are: Customer Service; Integrity; Philanthropy; Continuous Improvement; Flexibility; The Golden Rule; Collaboration; and, Protecting Relationships.

Office Locations
SGR's corporate headquarters is in Keller, Texas, in the Dallas/Fort Worth Metroplex. SGR also has virtual offices in:

Florida
Kissimmee
Lakeland

Massachusetts
Boston

Missouri
Gladstone

North Carolina
Mooresville

Oklahoma
Stillwater

Pennsylvania
Philadelphia

Texas
Abilene
Coppell
Corpus Christi
Granbury
Greenville
Lubbock
Murchison
North Richland Hills
Sugar Land
Tyler

Executive Recruitment Team

- Ron Holifield, Chief Executive Officer
- Melissa Valentine, Managing Director of Recruitment and Human Resources
- Leigh Corson, Talent Research Manager
- Muriel Call, Research Manager
- Delena Franklin, Lead Recruitment Coordinator
- Becky Welch, Recruitment Coordinator
- Courtney Ware, Recruitment Coordinator
- Andra Henson, Research Specialist
- Doug Thomas, Senior Vice President
- Cindy Hanna, Senior Consultant
- Bill Peterson, Senior Vice President
- Bob Turner, Senior Vice President
- Gary Holland, Senior Vice President
- Ken Wiegand, Senior Vice President
- Kirk Davis, Senior Vice President
- Kurt Hodgen, Senior Vice President
- Larry Boyd, Senior Vice President
- Larry Gilley, Senior Vice President
- Lissa Barker, Senior Vice President
- Mike Tanner, Senior Vice President
- Ron Robinson, Senior Vice President
- Tommy Ingram, Senior Vice President

TAB 3

UNIQUE QUALIFICATIONS

Marketing and Networking

- SGR's 10 in 10 Update on Leadership and Innovation e-newsletter, where all recruitments conducted by SGR are announced, reaches over 60,000 subscribers.
- SGR has an opt-in subscriber database of over 3,900 city management officials.
- SGR has formal collaborative partnerships with Florida City and County Management Association, Louisiana Municipal Association, Missouri Municipal League, Oklahoma Municipal League, National Public Employers Labor Relations Association, Engaging Local Government Leaders, City Management Association of Oklahoma, Texas Fire Chiefs Association, and Texas Recreation and Parks Society.
- SGR trains approximately 800 local government employees each month in live training classes.
- SGR has almost 300 local government clients in over 40 states for our recruitment, training, and leadership development business lines combined.

Each executive recruiter has many years of experience in local government and a national network of relationships. The entire executive recruitment group works as a team to leverage their networks to assist with each recruitment. SGR team members are active on a national basis, in both local government organizations and professional associations. Many SGR team members frequently speak and write on issues of interest to local government executives. Only SGR can work all of the relevant networks as a peer and insider, resulting in better recruitment, better investigation, better intelligence, better information, and better final decisions.

Comprehensive Needs Assessment

SGR's executive recruiting services are unequaled. Our role is to find the candidate who is the best match for your organization. SGR devotes a tremendous amount of energy to understanding your organization's unique culture, environment, and local issues to ensure a great "fit" from values, philosophy, and management style perspectives.

Finding qualified candidates is not difficult; the hard part is finding qualified candidates who are the right fit for your organization. A leading edge candidate and a safe harbor candidate often look the same on paper, but will have profoundly different impacts on your organization.

Accessibility

Your executive recruiter is accessible at all times throughout the recruitment process and can be reached by candidates or clients, even at night and on weekends, by cell phone or email.

Responsive to You

If a problem arises, or you have questions, you can count on SGR staff to be available, prepared, and prompt.

Trust of Candidates
SGR has a track record of remarkable confidentiality and providing wise counsel to candidates and next generation leaders; we have earned their trust. As a result, SGR is typically able to get exceptional prospects to become candidates, even if they have declined to become involved in other recruitment processes, because candidates trust SGR to assess the situation well, communicate honestly and bluntly, and maintain their confidentiality.

Listening to Your Unique Needs
SGR is more interested in listening than in talking. Some firms depend on their tried and true stable of reliable candidates. These firms do not really need to listen to the client because the recruitment will result in the same list of finalists, no matter the type of information they receive from the client. SGR devotes tremendous energy to actively listening to your organization and helping you define and articulate your needs. SGR does not just go through the motions and then provide you with a list of qualified names from a stable of regulars. We work hard to conduct a comprehensive recruitment that is unique to you.

Recorded Online Interviews with Candidates
SGR's unique online recorded interview process allows the search committee to see candidates in an interview setting prior to the finalist stage of the recruitment process, and without having to pay travel expenses.

Comprehensive Media Reports
One of the worst things that can happen for your organization is to be surprised by undisclosed information about a finalist, especially if the surprise comes in the form of a newspaper article that is found by your critics. SGR produces a comprehensive media search report on each finalist candidate. Each Media Report is compiled from information gathered using our proprietary online search process. This is not an automated process, and produces far superior results than a standard Google search which is typically utilized by other recruitment firms. The report length may be as long as 350 pages per candidate and may include news articles, links to video interviews, blog posts by residents, etc. No other firm provides such comprehensive media reports.

Comprehensive Background Investigation Reports
SGR provides the most comprehensive background investigations in the industry, and we are the only recruitment firm to use a licensed private investigation firm for these services.

Psychometric Assessments
SGR uses the DiSC Management Profile psychometric assessment to provide a detailed understanding of how candidates will lead and manage an organization. The DiSC assessment report also provides valuable information regarding candidates' strengths and weaknesses.

Equal Opportunity Commitment
SGR strongly believes in equal opportunity. SGR does not discriminate and is careful to follow both the letter and the spirit of laws regarding equal employment opportunities and non-discrimination. More importantly, however, SGR believes that equal opportunity is an ethical issue. SGR quite simply will not enter into an engagement with an entity or organization that directs, or expects, that bias should, or will be, demonstrated on any basis other than those factors that have a bearing on the ability of the candidate to do the job. You can anticipate that SGR will make a serious and sincere effort to include qualified women and minority candidates in the finalist pool. Although SGR obviously cannot, and would not, guarantee the makeup of the finalist group, SGR does have relationships and contacts nationwide to encourage the meaningful participation of women and minority candidates.

Value
For a variety of reasons that are detailed in this proposal, SGR will provide the most cost-effective executive recruitment for your organization. Some firms low ball their price, and make up for it by reducing the amount of time they commit, or charging extra for additional time required. SGR gives you a fixed price, and we are with you until the end of the process regardless of how many hours are required.

Emerging Leaders
SGR has a unique and unparalleled reputation of engaging and mentoring emerging leaders and young professionals. We will utilize our frequent personal interaction with emerging leaders, as well as our entire team's social media networks, to market this position and to identify potential applicants.

Service Guarantee
SGR provides the strongest guarantee in the industry.

1. You always have 24/7 cell phone and email access to the executive recruiter and SGR's CEO.
2. If you do not find the right candidate, we will start the process over with no additional professional fees.
3. If we place a candidate, who we have fully vetted through the SGR recruitment process, who stays less than 18 months, we will conduct the recruitment again with no additional professional fees. If the organization circumvents SGR's recruitment process and selects a candidate that did not participate in the full recruitment process, this guarantee is null and void.
4. If we place a candidate with you, we will not directly solicit them for another job.

TAB 4

KEY PERSONNEL FOR THIS RECRUITMENT

Ron Holifield, CEO
Ron Holifield is the Founder and CEO of SGR. He previously served as Assistant City Manager in Plano, Texas, as well as City Manager in Garland, DeSoto, Farmersville and Sundown, and on the City Manager's staff in Lubbock.

In 1996, he left city management and purchased Government Relations Specialists, which he grew into the 49th largest lobby firm in Texas before selling it to an employee. In 1999, Ron founded Strategic Government Resources to specialize in facilitating collaboration among local governments, with a particular emphasis on employee training and development of next generation leaders.

He has grown SGR into the largest private sector training company that specializes in leadership, management and customer service for local governments in the nation. He is a frequent speaker at state and national conferences and remains a high-profile figure in the city management profession.

Ron holds a Bachelor of Arts in Government from Abilene Christian University and a Master of Public Administration from Texas Tech University.

Kurt Hodgen, Senior Vice President
With over 30 years of local government experience, Kurt Hodgen joined SGR in 2017 as Senior Vice President. Most recently, from 2007 until his retirement, Kurt served as the City Manager for the City of Harrisonburg after having previously served as the Assistant City Manager beginning in 2001. From 1993 to 2001, Kurt was the Acting Assistant County Administrator/Director of Public Works for Botetourt County, Virginia. Before that, Kurt served as the Acting Town Manager for the Town of Narrows, Virginia.

Kurt has been active in his professional associations and is currently a member of the International City and County Management Association (ICMA) and the Virginia Local Government Management Association (VLGMA). Recently, he served as the Chairman for the Board of Directors for the Virginia Municipal League Insurance Program, in addition to serving on the Executive Committee for VLGMA, the Harrisonburg Rockingham Regional Sewer Authority, the Middle River Regional Jail Board of Directors, Harrisonburg Rockingham Emergency Communication Center Administrative Board, and more.

Kurt holds a Bachelor of Science in Public Administration and Political Science from James Madison University and is a Credentialed Manager from ICMA.

Kurt D. Hodgen, ICMA-CM
1871 Rhianon Lane
Harrisonburg, VA 22801
(540) 820-0531
kdhodgen@comcast.net

JOB OBJECTIVE:

To obtain a position in local government consulting that will allow me to utilize my work experiences, skills and knowledge in service to localities in need.

EDUCATION:

James Madison University, B.S. degree in Public Administration and Political Science, December, 1984. AWWA Utility Management Institute at Virginia Tech, 1989; Senior Executive Institute, University of Virginia, 1991; Virginia Institute for Economic Development, 1996; ICMA Credentialed Manager, 2003.

RELATED EXPERIENCE:

July 2007 – 2017: City Manager, City of Harrisonburg.
Chief Administrative officer of one of the fastest growing cities in Virginia, (population of just under 54,000). Responsible for preparation and administration of a $200+ million dollar budget (all funds), 12 departments and 754 FT employees. Appointed by a five member City Council, elected at-large.

Accomplishments and activities include:

- Numerous infrastructure projects including public buildings, water and sewer upgrades and expansions, new road construction, new bike and pedestrian trails, downtown redevelopment and streetscape improvements and parks and recreation facilities.
- Enhancements to the City's financial management policies; upgrades to the City's bond ratings; multiple successful bond issues; $30 million plus in state and federal transportation funding (grants and matching funds).
- Growth of the local economy through new commercial and retail, corporate expansions such as Rosetta Stone, Anthem Data Center, Serco, Axon, and Walker/Tenneco. Establishment of economic revitalization zones and technology zones.
- Growth and development of staff through internal and external education and training opportunities; succession planning.
- Intergovernmental/regional cooperative efforts including establishment of a City/James Madison University liaison committee consisting of City Manager and two Council members and JMU President and Senior Vice President that meets on a quarterly basis, continuation of City/County liaison meetings, City-School Board liaison meetings, shared services with the County; service on regional Boards and Commissions; serve as City's legislative liaison.

February 2001 – June 2007: Assistant City Manager, City of Harrisonburg.
Principal assistant to the City Manager. Performed duties of the city manager in his absence as well as all other duties assigned including liaison between City Manager and department heads; direct oversight of six departments; start-up and administration of City's CDBG Program; grant writing;

special project management; staff development; emergency services; report writing and presentations to City Manager and City Council.

Feb.1993 – Feb. 2001: Asst. County Admin./Dir. of Pub. Works, Botetourt County, Virginia. Top-level administrative position in rapidly growing County. Responsible for administration of multiple departmental activities including engineering, utilities, landfill and recycling, building and grounds maintenance, and parks and recreation. Administered departmental budgets of $3.2 million and capital projects budget totaling $3.8 million. Duties also included grant writing and administration; long range planning; staff development; economic development activities; emergency services; report writing and presentations to county administrator and Board of Supervisors.

January 1988 - February 1993: Town Manager, Town of Narrows, Virginia.
Chief Administrative Officer of a full-service town (pop. 2,100); managed $1.2 million dollar budget and 23 full-time employees; community development and planning activities including maintenance, capital projects, water and sewer, street and sidewalk improvements; agenda preparation for Council meetings. Prepared monthly financial reports, biweekly reports, and other reports and studies as required by council. Other activities as directed by Council. Developed standard purchasing and budgeting policies; completed major water and sewer system improvements totaling over $2.5 million dollars. Other activities included grant writing and administration, and intergovernmental cooperation efforts.

Dec. 1986 – Jan.1988: Public Admin. Specialist, Mt. Rogers Planning District Commission.
Served as Circuit Riding Town Manager for the towns of Fries and Independence, Virginia. Wrote and/or administered CDBG, EPA and FmHA grants in excess of $6 million dollars for community development projects.

January 1985 - August 1986: Asst. to the County Administrator, Alleghany County, Virginia.
Duties included assistance in preparation and administration of $10 million dollar budget, project manager for the renovation of and movement to a new county office building. Prepared reports, assisted in day-to day operations, other duties as assigned by the County Administrator.

PROFESSIONAL MEMBERSHIPS:

International City and County Management Association (ICMA)
Virginia Local Government Management Association (VLGMA)

OTHER CURRENT AFFILIATIONS:

Virginia Municipal League Insurance Program, Current Chairman of Board of Directors
Virginia Local Government Management Association Executive Committee (2006-08)
Virginia Local Government Management Association Support Network Coordinator
Harrisonburg Rockingham Regional Sewer Authority Board of Directors
Middle River Regional Jail Board of Directors
Harrisonburg Rockingham Emergency Communication Center Administrative Board
Harrisonburg Rockingham Social Services District Administrative Board
Central Shenandoah Juvenile Detention Center Board of Directors
Community Criminal Justice Board, Board member
Virginia Commission on Local Government Annexation Study Committee member

Ron Holifield
Resume – March, 2018

Strategic Government Resources, P.O. Box 1642, Keller, Texas 76248
Cell: 214-676-1691, Ron@GovernmentResource.com

PROFESSIONAL HISTORY

Strategic Government Resources – Owner & CEO
January 1999 to Present

- Owner and CEO of this strategic management firm, helping over 550 local governments Recruit, Assess and Develop Innovative, Collaborative and Authentic Leaders.
- SGR is the largest provider of live and online training in the nation designed specifically for local government, training up to 1,000 employees/officials every month in 45 states.
- SGR is the third largest local government executive search firm in the nation.
- Interviewed and/or quoted by numerous news publications and media outlets including: National Public Radio, Entrepreneur Magazine, Government Technology, GovWire, Federal Computer Week, CIO Magazine, Dallas Business Journal, DFW Tech Biz, D Magazine, International Association of Chiefs of Police Journal, as well as numerous newspapers and broadcast news outlets in a wide variety of national media markets.

Government Relations Specialists – Owner & CEO
August 1996 to September 2001

- Owner and CEO of this consulting firm which represented businesses doing business with government and in legislative advocacy efforts.
- Doubled it in size, becoming the 49th largest lobby firm in Texas, and then sold it to an employee to focus all efforts on the launch of SGR.
- Major clients included over 40 Fortune 500 firms including American Express, Aramark, Automated Licensing Systems, Children's Comprehensive Services, IBM, Quorum Health Group, Library Systems and Services, PeopleSoft, SCT, Space Imaging, TXI, Verizon, Xerox and many others.

City of DeSoto, Texas – City Manager
October 1994 to August 1996

- Significant accomplishments include:
  - Named by Texas Business Magazine as a top 20 Texas city to relocate a business.
  - Named by Texas Outlook Magazine as a top 25 city for economic development.
  - Named by Texas Business Magazine as one of the “Best Run Cities in Texas.”
  - Increase in commercial building permits in excess of 1,000% over previous year.
  - Lowest crime rate of any major city in the Dallas-Fort Worth Metroplex.

City of Garland, Texas – City Manager
November 1991 to June 1994

- City Manager of this rapidly growing city, which owns and operates an electric production and distribution system, a regional wastewater treatment system, a regional landfill, and a heliport, and offers a variety of social services and strong cultural arts. The ninth largest city in Texas, Garland's population was in excess of 220,000 with over 2,300 employees, and an annual operating and capital budget in excess of $350 million.
- Hired to take this very traditional manufacturing-based community and rapidly position it as a statewide leader, transforming its one-dimensional image and reputation as a blue-collar suburb into that of a leading first tier city.

City of Plano, Texas – Assistant City Manager, Assistant to the City Manager
November 1986 to November 1991

- Served in a variety of capacities in this rapidly growing, premier city, including: Assistant City Manager of Community Services, Assistant City Manager of Administration, Acting Assistant City Manager for Development, and Assistant to the City Manager.

City of Farmersville, Texas – City Manager
1984 to 1986

- First City Manager of this full service city operating an electric system and two lakes.

City of Sundown, Texas – City Manager
1982 to 1984

- City Manager of this full service city operating a natural gas system and a golf course.

City of Lubbock, Texas – City Administrative Intern to the City Manager
1981 to 1982

- Administrative Intern to the City Manager.

EDUCATION

- Texas Tech University – Masters of Public Administration
- Abilene Christian University – Bachelor of Arts, Government Major / Student Association President

MAJOR AWARDS for Municipal Organizations Managed

- 3CMA Economic Development Marketing Campaign Savvy Award Certificate of Excellence for International Development and Local Realtor Ads - Garland
- International Association of Chief's of Police, Excellence in Policing Award for Neighborhood Service Team - Garland
- Finalist, Governor's Environmental Excellence Award - Garland
- Texas Natural Resource Conservation Commission Award for Excellence - Garland
- American Society of Landscape Architects, Texas Chapter, Environmental Stewardship Award for Garland's Spring Creek Forest Preserve - Garland
- Dallas Business Journal, "Metroplex Real Estate Deal of the Year (Existing Building)," – Garland
- Dallas Business Journal "Metroplex Real Estate Deal of the Year (New Construction)," - Garland
- GFOA Award for Distinguished Budget Presentation, every year, 1987-1996
- GFOA Certificate of Achievement for Excellence in Financial Reporting, 1987-1991

CURRENT PROFESSIONAL PARTICIPATION

- ICMA Conference Evaluation Committee, 2017
- ICMA Task Force on Inclusiveness, 2014 – 16
- Texas Police Chief's Association Training Advisory Committee 2018-present
- Member, Texas Fire Chief's Association Best Practices Recognition Board, 2014-present
- National Institute for Governmental Purchasing Talent Management Council, 2014
- Missouri Municipal League Governance Institute Fellow, 2013-present
- Texas City Management Association Task Force on Professional Development, 2014-15
- Author, "the 16%" weekly blog, 2013-2017
- Author, "Fourth Dimension Leadership", 2010
- Member, International City/County Management Association (ICMA), 1982-present
- Member, Texas City Management Association (TCMA), 1982-present
- Member, Texas Municipal Human Resources Association, 2006 - present
- Member, Governmental Finance Officers Association, 2010 - present

PREVIOUS PROFESSIONAL PARTICIPATION

- Author of *4th Dimension Leadership – a Radical Strategy for Creating An Authentic Servant Leadership Culture*
- Author of a Monthly Column in Texas City Manager Magazine on "Innovations that Make a Difference"
- ICMA Task Force on Employment Agreements

- ICMA Management Innovations Panel
- ICMA Conference Evaluation Committee
- ICMA/Innovation Groups National Management Practices Panel
- Author, "The Public Executive's Complete Guide to Employment Agreements", book published by ICMA and the Innovation Groups
- Texas Innovation Groups Executive Committee
- Author, "Crossing Department Lines – Garland's Neighborhood Service Team", article published in the International Association of Chiefs of Police National Journal
- Author, "Redefining Thinking, Structures and the Rules of the Game in Government", article published in Texas Town and City Magazine
- Contributor, State Comptroller Bob Bullock's handbook for municipalities: "Standard Financial Management System for Texas Cities"
- Texas Municipal League Advisory Committee on Legislative Affairs – Personnel Issues
- TCMA Ethics and Professional Standards Committee
- TCMA Annual Conference Committee

SPEAKING ENGAGEMENTS

- Ohio City Management Association, 2018
- Louisiana Municipal Association, 2018
- Florida City County Management Association Winter Summit, 2018
- SGR Servant Leadership Conference, 2018
- Texas Recreation and Parks Society, 2017
- Illinois Public Health Association, 2017
- Tennessee Governmental Finance Officers Association, 2017
- Texas Municipal HR Association, 2017
- Washington Public Employers Labor Relations Association, 2017
- International Personnel Management Association, 2017
- Oklahoma Municipal League, 2017
- Missouri Municipal League, 2017
- Florida League of Cities, 2017
- Michigan City Management Association, 2017
- Texas Municipal Utilities Association, 2017
- Florida City County Management Association, 2017
- International Personnel Management Association Midwest, 2017
- Missouri City Management Association, 2017
- National Public Employers Labor Relations Association, 2017
- Texas Municipal Clerks Association Annual School, 2017
- SGR Leadership Conference, 2017
- Texas City Management Association Regional Meeting, 2016
- Colorado Governmental Finance Officers Association, 2016

- Ohio City Management Association/Ohio Parks and Recreation Association Joint Conference, 2016
- Illinois Public Employer's Labor Relations Association, 2016
- Urban Management Assistant's/Emerging Local Government Leaders Pop Up Conference, 2016
- Texas Fire Marshall's, 2016
- Kentucky League of Cities, 2016
- Missouri Municipal League, 2016
- Florida League of Cities, 2016
- Arizona Parks and Recreation Association Conference, 2016
- Association of Public Safety Communications, 2016
- Texas City Management Association, 2016
- Florida City County Manager's Conference, 2016
- Colorado Emerging Leaders Conference, 2016
- Texas Municipal HR Association, 2016
- Florida City County Management Association, 2016
- Speak at National Public Employers Labor Relations Association, 2016
- Georgia City Management Association, 2016
- New Mexico Society of Human Resource Management, 2016
- Colorado Chapter of International Personnel Management Association, 2016
- Colorado City County Management Conference, 2016
- CPS Annual Conference, 2016
- Ohio Public Employer's Labor Relations Association, 2016
- Emerging Local Government Leaders, 2015
- National Purchasing Institute, 2015
- Public Libraries Association of North Texas, 2015
- Washington Public Employers Labor Relations Association, 2015
- Oregon City Management Association, 2015
- Colorado City Management Association Emerging Leaders, 2015
- Texas Municipal HR Association Nuts and Bolts Workshop, 2015
- National Association of County Clerks and Recorders, 2015
- Gettysburg Leadership Workshop, 2015
- Association of Washington Cities, 2015
- Texas City Manager's Associationl, 2015
- International Personnel Management Association Midwest Conference, 2015
- East Texas City Manager's Association, 2015
- Missouri Association of Purchasing Professionals, 2015
- Association of Washington Cities Labor Relations Institute, 2015
- Texas Public Employers Labor Relations Association, 2015
- Dallas Office of the FBI on Valuing Workplace Diversity and the Difference Between Bias and Prejudice, 2015
- Government Finance Officers Association of Texas, 2015
- National Public Employers Labor Relations Association, 2015

- Tennessee Government Finance Officers Association, 2015
- Missouri City Clerks, 2015
- Texas Fire Educators Association, 2015
- SGR Servant Leadership Conference, 2015
- National Forum for Black Public Administrators DFW Chapter, 2014
- Public Purchasing Association of North Texas, 2014
- Missouri Intergovernmental Risk Association, 2014
- Texas City Management Association, 2014
- American Public Works Association Midwest, 2014
- Governmental Finance Officers Association, 2014
- National Public Employers Labor Relations Association, 2014
- North Texas Municipal Clerks Association, 2014
- National Institute for Governmental Purchasing Lone Star Conference, 2014
- Missouri Municipal Clerks and Finance Officers Association, 2014
- South Texas City Manager's Association 2014
- Urban Counties Annual Conference, 2014
- SGR Annual Conference on Creating a Learning Organization, 2014
- National Public Employers Labor Relations Association Annual Conference, 2013
- National Parks and Recreation Annual Conference 2013
- Missouri Municipal League Annual Conference, 2013
- Washington City/County Management Association Annual Conference, 2013
- Nebraska City/County Management Association Annual Conference, 2013
- Tennessee Municipal League Annual Conference, 2013
- Texas City Manager's Association Annual Conference, 2013
- Government Finance Officers Association of Texas Annual Conference, 2013
- American Public Works Association Regional Conference, 2013
- Kansas Public Works Association Annual Conference, 2013
- Texas Recreation and Parks Association Annual Conference, 2013
- Texas Public Purchasing Association Annual Conference, 2013
- Colorado City County Management Association Annual Conference, 2013
- Kansas City County Management Association Annual Conference, 2012
- National Parks and Recreation Management School, 2012
- Texas City Management Study Group, 2012
- International City County Management Association Annual Conference, 2012
- National Procurement Institute, 2012
- Missouri Municipal League Annual Conference, 2012
- Texas City Clerk's Association Annual School, 2012
- Texas County Clerk's Association Annual School, 2012
- Kansas Governmental Finance Officers Association Annual Conference, 2011
- Texas City Management Association Annual Conference, 2010
- Public Risk Management Assoc. Annual Conference, 2010
- Oklahoma City Manager's Association Annual Conference, 2010
- Northwest States City Management Association Annual Conference, 2010

- Ohio City/County Management Assoc. Annual Conference, 2009
- West Texas City Management Association Annual Training Conference, 2009
- Texas Municipal League Regional Meeting, 2009
- Texas Municipal Human Resources Association Annual Nuts and Bolts Conference, 2009
- East Texas City Management Association Annual Training Conference, 2008
- East Texas City Management Association Annual Training Conference, 2007
- International City/County Management Association Conference, 2006
- Certified Public Manager Program, 2006
- North Texas Municipal Clerks Association Management Institute, 2006
- City of Carrollton, Texas, Leadership Academy, 2006
- City of Arlington, Texas, Leadership Academy, 2005
- Urban Management Assistants of North Texas Annual One Day Conference, 2005
- Leadership Southwest, 2004, 2006, 2008
- International City/County Management Association Annual Conference, 2003
- Keynote Speaker (along with the Deputy Secretary of Defense), Government Electronics and Information Technology Association Information Technology and Defense Electronics Forecast Annual Conference – State and Local Homeland Security, 2002
- Transforming Local Government Conference, 2001
- National Association of Counties Annual Conference, 1999
- World Services Congress – Building Public Private Partnerships, 1999
- Central Texas City Management Association, 1999
- Carolinas-Virginia Hospital Trustee/Physician Conference, 1999
- Quorum Ohio CEO Conference, 1999
- Chairman of the Board In-Service Training, Quorum, 1999
- Quorum Foundations for the Future, 1999
- Quorum Chairman of the Board Training, 1998
- International City County Management Association, 1998
- Iowa Municipal Management Institute, 1997
- Quorum Foundations for the Future, 1997
- Quorum Board of Trustees Training, 1997
- Urban Management Assistants of North Texas, Conference of Minority Public Administrators, and National Forum for Black Public Administrators Workshop – 1996
- Innovation Groups Regional Conference, 1996
- Texas City Management Association Annual Conference, 1996
- Florida City/County Management Assoc. Annual Conference, 1996
- North Carolina City/County Management Association Annual Conference, 1996
- Quorum Foundations for the Future, 1996
- International City/County Management Association Conference, 1996
- Texas City Management Association Conference, 1995
- Kansas Innovation Groups Regional Workshop, 1995
- City-County Communications & Marketing Association National Conference, 1994
- National League of Cities Innovations in Government National Conference, 1994

- Innovation Groups Regional Workshop, 1994
- Texas Foundation for the Improvement of Local Government Institute, 1994

OTHER HONORS AND ACTIVITIES

- American MENSA member
- Distinguished Alumni, Abilene Christian University
- Abilene Christian University Public Administration Visiting Committee
- Texas Tech University, Center for Public Service, Alumni of the Year

TAB 5

PROJECT METHODOLOGY

SGR provides a comprehensive scope of executive recruitment services, and each executive recruitment service contract is tailored to meet the client's specific needs. However, a full-service recruitment typically entails the following:

1. **Organizational Inquiry and Analysis**
    - Outline Project Plan and Timeline
    - Individual Interviews with Search Committee / Key Personnel / Community Leaders (if desired)
    - Development of Position Profile and Professional Production of Brochure

2. **Advertising and Recruitment**
    - Ad Placement
    - Social Media and Marketing of Position
    - Ongoing Communication with Applicants and Prospects

3. **Initial Screening and Review**
    - Management of Applications
    - Evaluation and Triage of Resumes
    - Search Committee Briefing to Facilitate Selection of Semifinalists

4. **Evaluation of Semifinalist Candidates**
    - Personal Interaction with Semifinalist Candidates
    - Written Questionnaire
    - Recorded Online Interviews
    - Media Search Stage 1
    - Semifinalist Briefing Books
    - Search Committee Briefing to Facilitate Selection of Finalists

5. **Evaluation of Finalist Candidates**
    - Comprehensive Media Search Stage 2
    - Comprehensive Background Investigation Report
    - DiSC Management Assessment
    - Finalist Briefing Books
    - Press Release (if desired)
    - Stakeholder Engagement (if desired)

6. **Interview Process**
    - First Year Game Plan (if desired)
    - Conduct Interviews
    - Deliberations
    - Reference Checks

7. **Negotiations and Hiring Process**
    - Determine the Terms of an Offer
    - Negotiate Terms and Conditions of Employment
    - Transition Strategy

8. **Post-Hire Team Building Workshop (supplemental service, if desired)**
    - I-OPT Team Building Workshop

Step 1: Organizational Inquiry and Analysis

In the Organizational Inquiry and Analysis Stage, SGR devotes tremendous energy to understanding your organization's unique culture, environment, and goals to ensure you get the right match for your particular needs.

Outline Project Plan and Timeline

SGR will meet with the client at the outset of the project to finalize the recruitment plans and timeline. At this time, SGR will also request that the client provide additional information about the community, organization, and position. Information requested will include general information and available resources about the community, school district, economic vitality, political leadership, organization, strategic plan, governing body goals and objectives, budget information, major projects, job description, salary range, benefits package, etc.

Individual Interviews with Search Committee and Key Personnel (if desired)

Fully understanding your organizational needs is the most critical part of conducting a successful executive recruitment. SGR conducts individual interviews with the Search Committee, key staff, and/or direct reports to find out more about the position, special considerations, and the political environment. These interviews last approximately 30 minutes to one hour each and identify individual issues that may affect the dynamics of the recruitment, as well as develop a composite understanding of the organization's preferences. This process helps with organizational buy-in and will assist us in developing the Position Profile as we look for any significant staff issues or major disconnects that may not otherwise be apparent.

Development of Position Profile Brochure

Following the individual interviews and internal analysis, SGR will develop a draft Position Profile Brochure that is reviewed and revised in partnership with your organization until everyone agrees it accurately reflects the sought-after leadership and management characteristics. A sample brochure is included with this proposal document.

Step 2: Advertising and Recruitment

The Advertising and Recruitment stage includes ad placement, email distribution of the Position Profile, responding to inquiries about the position, and ongoing communication with applicants and prospects.

Ad Placement / Social Media and Marketing of Position

The Executive Recruiter and client work together to determine the best ways to advertise and recruit for the position. Ads are typically placed in various state and national publications, targeting the most effective venues for reaching qualified candidates for that particular position.

SGR's preferred strategy is to rely on email distribution of the Position Profile Brochure to key opinion leaders and potential prospects across the country. The position will be announced in our "10 in 10" e-newsletter, which reaches over 60,000 local government professionals, in

addition to a targeted email announcement to specific professional categories and/or areas of the country. By utilizing an email distribution strategy, these brochures tend to "get legs" of their own, resulting in a very high penetration rate at minimal cost.

SGR will utilize Facebook, Twitter, personal phone calls, personal emails, LinkedIn, Instagram, and Pinterest to promote the position. This communication is both to solicit high potential candidates and to encourage key local government professionals to share information within their professional circles.

Ongoing Communication with Applicants and Prospects

SGR communicates with all applicants on a frequent and ongoing basis to ensure applicants stay enthusiastic about the opportunity. Outstanding prospects often will not submit a resume until they have done considerable homework on the available position. A significant number of inquiries will be made, and it is essential that the executive search firm be prepared to answer those questions with fast, accurate, and complete information, and in a warm and personal manner. This is one of the first places a prospective candidate will develop an impression about organization, and it is an area in which SGR excels. SGR also utilizes Google Alerts for each client organization and provides updates to our Executive Recruiters and applicants of any references made regarding the client organization in various media outlets.

Step 3: Initial Screening and Review

This stage of the executive recruitment involves managing the flow of resumes, and screening and evaluating resumes.

Management of Applications

Handling the flow of resumes is an ongoing and significant process. On the front end, it involves tracking resumes and promptly acknowledging their receipt. It also involves timely and personal responses to any questions or inquiries.

Evaluation and Triage of Resumes

SGR uses a triage process to identify high-probability, medium-probability, and low-probability candidates. The triage ranking is focused on overall assessment based on interaction with the applicant, qualifications, any known issues regarding previous work experience, and evaluation of cultural fit with the organization.

In contrast with the triage process described above, which focuses on subjective assessment of the resumes and how the candidates present themselves, we also evaluate each candidate to make sure that the minimum requirements of the position are met, and which of the preferred requirements are met. This sifting process assesses how well candidates' applications fulfill the recruitment criteria outlined in the Position Profile.

Search Committee Briefing / Selection of Semifinalist Candidates
At this briefing, SGR will provide a comprehensive progress report via PowerPoint presentation and will facilitate the selection of approximately 8-12 semifinalists. The presentation will include summary information on the process so far, the candidate pool overall, and any trends or issues that have arisen, as well as a briefing on each candidate and their credentials. No other firm offers this level of reporting detail and transparency.

Step 4: Evaluation of Semifinalist Candidates

Reviewing resumes is an important and valuable step in the executive recruitment process. However, the simple fact is that resumes can be misleading. They tell you nothing about the individual's personal qualities or his/her ability to get along with other people. Resumes can also exaggerate or inflate accomplishments or experience. SGR's responsibility is to go more in-depth than the resume to ensure that those candidates who continue in the process are truly outstanding.

Personal Interaction with Semifinalist Candidates
SGR's goal is to have a clear understanding of the person behind the resume and what makes him/her an outstanding prospect for you. The evaluation of semifinalist candidates includes follow-up by phone when appropriate to ask any questions about underlying issues.

Written Questionnaire
SGR will ask semifinalist candidates to complete a comprehensive written exercise designed to provide greater insight into candidate thought processes and communication styles. SGR's written instrument is custom-designed around the priorities identified by the Search Committee and usually includes about 20 questions focusing on 5-6 key areas of particular interest to the client. This written instrument will be included in the semifinalist briefing book along with the cover letters and resumes.

Recorded Online Interviews
SGR offers recorded online videos of candidates answering pre-recorded questions. This provides a very insightful, efficient and cost effective way to gain additional insights to utilize in selecting finalists you want to come in for live interviews. The online interviews allow the Search Committee to evaluate technological competence, demeanor, verbal communication skills, and on-camera presence. Online interviews also convey to candidates that the organization is using leading edge technology in its business processes and provide an opportunity for the Search Committee to ask candidates questions on specific topics of special interest. Online interviews are emailed to the Search Committee for viewing prior to selection of finalist candidates.

Media Search Stage 1
Stage 1 of our media search involves a comprehensive review of all newspaper articles on the candidate in major news outlets within the previous two years. These media reports at the semifinalist stage have proven helpful by uncovering issues that were not previously disclosed

by prospective candidates. The Executive Recruiter will communicate any "red flags" to the Search Committee immediately upon discovery.

Search Committee Briefing / Selection of Finalist Candidates
Prior to this briefing, SGR will provide each member of the Search Committee with a briefing book on the semifinalist candidates. The briefing book will include written questionnaires, online interviews, and any additional information obtained about the candidate. The purpose of this briefing is to facilitate narrowing the list to 4-6 finalists who will be invited for personal interviews.

Step 5: Evaluation of Finalist Candidates

Once the finalists have been selected, SGR will coordinate with you to schedule interviews.

Comprehensive Media Search Stage 2
These Stage 2 Media Reports are compiled by utilizing our proprietary media search process including variations of the candidates' names and states/cities in which they have lived or worked, and searches of local papers where the candidates have lived or worked. We also search social media sites. The Media Reports typically range from 20-300 pages per candidate and may include news articles, links to video interviews, blog posts by residents, etc. The Media Reports are put into an easy-to-read format and recorded onto flash drives for the Search Committee. The candidate's name is highlighted each time it appears.

These media reports have proven helpful to Search Committees by uncovering issues that were not previously disclosed by candidates and that would likely not have been discovered through an automated search or Google search, typically used by other recruitment firms. The Media Reports also give the Search Committee an overview of the type and extent of press coverage that a candidate has experienced over the course of his/her career.

Comprehensive Background Investigation Reports
Through SGR's partnership with FirstCheck, a licensed private investigations company, we are able to provide our clients with comprehensive background screening reports that include detailed information such as:

- Social Security number trace
- Address history
- Driving history/motor vehicle records
- Credit report
- Federal criminal search
- National criminal search
- County wants and warrants for previous 10 years
- Global homeland security search
- Sex offender registry search
- State criminal search (for current and previous states of residence)

- County criminal search (for every county in which candidate has lived or worked) for previous 10 years
- County civil search (for every county in which the candidate has lived or worked) for previous 10 years
- Education verification

A sample Background Investigation Report is included with this proposal document.

Assessments (DiSC Management Profile)

It is critical for you to know as much as you can about your new executive before hiring him/her. Historically, employers have depended upon resumes, references, and interviews as sources of information for making hiring decisions. In practice, these sources have often proved inadequate for consistently selecting successful employees. The use of assessments has become essential for employers who want to place the right people in the right positions.

SGR uses a DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management Profile analyzes and reports comprehensively on the candidate's preferences in five vital areas: management style, directing and delegating, motivation, development of others, and working with his/her own manager.

Press Release (if desired)

Until you have "sealed the deal," you need to be cautious in order to avoid the embarrassment of a premature announcement that does not work out. You also want to try to notify all senior staff and unsuccessful candidates before they read about it in the newspaper. SGR will assist with this coordination and with drafting any announcements or press releases.

Stakeholder Engagement (if desired)

At the discretion of the Search Committee, we will work closely with your organization to engage stakeholders in the recruitment process. Our recommendation is that we design a specific stakeholder engagement process after we learn more about the organization and the community. Different approaches work best in different communities. Below is an array of options we have used in the past, but we will collaborate with your organization to determine which option, or combination of options, will be the most effective for the unique needs of the organization.

- Interviewing community leaders at the outset of the recruitment;
- Holding a public forum for citizen engagement at the outset of the recruitment;
- Facilitating a Q&A series in the local newspaper with finalist candidates. This would run a week or two prior to the interviews;
- Utilize a citizen committee to conduct the early stage candidate screening and then turn over a semifinalist list to the City Council (if applicable);
- Community leader reception;
- Meet and greet;
- Search Committee and key community leader dinner meeting;

- “Round Robin” forum meetings with various community groups during a multi-day interview process; and,
- Site visits by citizen committee members to the finalist candidates’ communities to report back.

Step 6: Interview Process

Once the finalists have been selected, SGR will coordinate with you to schedule interviews.

First Year Game Plan (if desired)

The “First Year Game Plan” is a process where finalist candidates are provided with the contact information for elected officials, key staff, and community leaders, and candidates are given free rein to make contact with all of them in advance and use those insights to develop a “first year game plan” based on what they know so far. Feedback is received from the key contacts on their impressions of the finalist candidates from the interactions with the candidates prior to the interviews. This exercise provides the opportunity to evaluate candidates’ written and interpersonal communication skills, as well as critical analysis skills.

Conduct Interviews

SGR will schedule interviews at a date/time convenient to your organization. This process can be as simple, or as complex, as your organization desires. SGR will help you determine the specifics you need. SGR will prepare sample interview questions and will participate throughout the process to make it smooth and efficient.

Deliberations

SGR will facilitate a discussion about the finalist interviews and assist the Search Committee in making a hiring decision or on whether to bring back one or more candidates for a second interview.

Reference Checks

Our reference checks are the most comprehensive in the industry. We place very little confidence on the references provided by the candidates since those can be expected to be biased. Instead, we will typically talk to as many as 20 professional contacts for a given candidate including elected officials, direct supervisors, direct reports, internal organizational peers, professional peers in other organizations, civic leaders, and media representatives. We always seek out the candidate’s greatest critics and greatest fans to ensure a complete, yet balanced, perspective and overview of each candidate.

Step 7: Negotiations and Hiring Process

Once the organization is ready to make an offer, SGR can provide additional assistance to the client in the following areas.

Determine the Terms of an Offer

Upon request, SGR will provide comparative data for selected organizations, appropriate employment agreement language, and other similar information to assist you in determining an appropriate offer to extend to your candidate of choice.

Negotiate Terms and Conditions of Employment

SGR will assist to whatever degree you deem appropriate in conducting negotiations with the chosen candidate. SGR will determine and define any special needs or concerns of the chosen candidate, including anything that could be a complicating factor. SGR is experienced and prepared to help craft win-win-solutions to negotiation "log-jams."

Transition Strategy

There are a variety of transition issues when hiring a new executive. SGR will brief the client on transition issues that need to be addressed and will provide a recommendation on what actions to take. Together, we will create a transition strategy that builds the foundation for a successful long-term relationship.

Step 8: Post-Hire Team Building Analysis (supplemental service)

SGR can provide a customized team building workshop after you hire for the position. SGR utilizes I-OPT, which is a validated measurement tool that shows how a person perceives and processes information. Because people "see" different things when they assess a situation, they are motivated to take various courses of action, so understanding you and your colleagues' I-OPT Profiles will enable you to work much more effectively as a team. The price is $4,000 for a half-day onsite workshop, plus travel expenses, and $150 per person for I-OPT reports (if not previously completed as part of the recruitment process), which include Individual Analysis Report, Emotional Impact Management Report, Change Management Report, and Team Management Report. Two-Person Reports can be ordered for an additional fee of $50 per report.

TAB 6

TIMELINE (STANDARD RECRUITMENT)

Task	Weeks
• Contract Executed • Outline Project Plan, Timeline • Individual Interviews with Search Committee / Key Personnel / Community Leaders (if desired)	Week 1
• Development of Position Profile Brochure • Search Committee Reviews and Approves Brochure	Weeks 2-3
• Ad Placements • Accept Applications • Email Distribution and Marketing of Position Profile	Weeks 4-7
• Triage and Scoring of Resumes	Week 8
• Search Committee Briefing (Slide Presentation) / Select Semifinalists • Candidates Complete Questionnaire and Online Interviews • Stage 1 Media Searches	Week 9
• Deliverable: Semifinalist Briefing Books	Week 10
• Search Committee Briefing / Select Finalist Candidates	Week 11
• Comprehensive Media Search Stage 2 • Comprehensive Background Screening Report • Candidates Complete DiSC Management Assessment	Weeks 12-13
• Deliverable: Finalist Briefing Books	Week 14
• Stakeholder Engagement (if desired) • Conduct Interviews • Deliberations • Reference Checks • Negotiations • Announcement / Press Release	Week 15

Each recruitment timeline is different based on the particular needs of the organization. SGR has completed searches in as little as 45 days, although this is not the recommended approach. We have also extended recruitment well beyond 15 weeks, based on the preference of the client.

TAB 7

PROJECT COST

First Search: All-Inclusive Maximum Price

Professional Services Fee:	$ 18,500
Expenses Not-to-Exceed:	$ 9,500
All-Inclusive, Not-to-Exceed Maximum Price:	**$ 28,000***

Second Search: All-Inclusive Maximum Price

Professional Services Fee:	$ 18,500
Expenses Not-to-Exceed:	$ 6,500
All-Inclusive, Not-to-Exceed Maximum Price:	**$ 25,000***

Third Search: All-Inclusive Maximum Price

Professional Services Fee:	$ 18,500
Expenses Not-to-Exceed:	$ 3,500
All-Inclusive, Not-to-Exceed Maximum Price:	**$ 22,000***

Expenses Not-to Exceed

SGR does not bill the client for any expenses except for those explicitly detailed herein. Items included in the Expenses Not-to-Exceed include:

- Professional production of a high quality brochure. This brochure (typically 4 pages) is produced by SGR's graphic designer for a flat fee of $1,500.
- Ad placement in appropriate professional publications, including trade journals and websites, and related advertising to announce the position. This is billed at actual cost, with no markup for overhead. (However, the costs of ad placements in newspapers are not part of the not-to-exceed ad placement costs.)
- Printing of documents and materials. Reproduction costs for reports and briefing books presented to the client at 26 cents per copy, plus the cost of binders/binding. Flash drives are billed at $10 each.
- Online interviews. There is a cost of $200 for each recorded online interview. SGR recommends conducting online interviews at the semifinalist stage (up to 12 semifinalists).
- Psychometric Assessments. There is a cost of $150 per candidate for the DiSC Management Profile (up to 6 finalists).
- Comprehensive Media Reports – Stage 2. There is a cost of $500 per candidate. SGR recommends conducting Stage 2 media searches on the finalist candidates (up to 6 finalists).

- Comprehensive Background Investigation Reports. There is a cost of $300 per candidate for comprehensive background screening reports prepared by our licensed private investigations provider. SGR recommends conducting comprehensive background investigations on the finalist candidates (up to 6 finalists).
- Travel for the Executive Recruiter (incurred for the benefit of the client). Meals are billed at a per diem rate of $10 for breakfast, $15 for lunch, and $25 for dinner. Mileage will be reimbursed at the current IRS rate. All other travel-related expenses are billed back at actual cost, with no markup for overhead.
- Up to four (4) visits/trips by the Recruiter to the Organization. Any additional visits/trips by the Recruiter to the Organization will be billed over and above the not-to-exceed maximum price.

***Supplemental Services**

The supplemental services listed below are not included in the maximum price above. These supplemental services include:

- Candidate Travel. Candidates are typically reimbursed directly by the client for travel expenses. If the client prefers a different arrangement for candidate travel, SGR will be glad to accommodate the client's wishes.
- Stakeholder Survey. SGR will conduct a Stakeholder Survey for $1,000. SGR provides recommended survey questions and sets up an online survey. Stakeholders are directed to a web page or invited to take the survey by email. Written summary of results is provided to the organization.
- Post-Hire Team Building Analysis. A half-day onsite workshop is $4,000, plus travel expenses, and $150 per person for I-OPT reports (if reports were not previously completed as part of the recruitment process), which include Individual Analysis Report, Emotional Impact Management Report, Change Management Report, and Team Management Report. Two-Person Reports can be ordered for an additional fee of $50 per report.
- Site Visits to Communities of Finalist Candidates. If desired, the Executive Recruiter will travel to the communities of the finalist candidates to conduct onsite visits. Site visits will be charged at a day rate of $1,000 per day, plus travel expenses.
- In the unexpected event the client shall request that unusual out of pocket expenses be incurred, said expenses will be reimbursed at the actual cost with no mark up for overhead.
- If the client desires any supplemental services not mentioned in this section, an estimate of the cost and hours to be committed will be provided at that time, and no work shall be done without approval. Supplemental services will be billed out at $250 per hour.

Billing

Professional fees for the recruitment are billed in three equal installments during the course of the recruitment. The initial installment is billed after the Organizational Inquiry and Analysis is completed and the position profile has been created. The second installment is billed when semifinalists are selected. The final installment is billed at the conclusion of the recruitment. Expense (reimbursable) items and supplemental services will be billed with each of the three installments, as appropriate.

TAB 8

PROVISION OF SERVICE GUARANTEE

SGR guarantees that you will be satisfied with the results of the recruitment process, or we will repeat the entire process at no additional professional fee until you find a candidate that you desire. Additionally, if you select a candidate (that SGR has fully vetted) who resigns or is released within 18 months of their hire date, SGR will repeat the process at no additional professional fee to the client. If the Organization circumvents SGR's recruitment process and selects a candidate who did not participate in the full recruitment process, the service guarantee is null and void. We also guarantee that we will not directly solicit a candidate we bring to you for another job.

TAB 9

References

Andrea Surratt, City Manager
City of Bozeman, Montana (pop. 45,000)
Email: asurratt@bozeman.net
Phone: 406-582-2306

Laurie Dove, Mayor
City of Valley Center, Kansas (pop. 5,100)
Email: vcmayor@valleycenterks.org
Phone: 316-755-7310

Nan Johnston, Mayor
City of Parkville, Missouri (pop. 5,500)
Email: njohnston@parkvillemo.gov
Phone: 816-741-7676

Krista Miller, Director of Human Resources, Safety & Risk Management
Town of Vail, Colorado (pop. 4,800)
Email: kmiller@vailgov.com
Phone: 970-477-3512

Kristie Hammitt, Executive Director, Central Services
City of Eugene, Oregon (pop. 166,000)
Email: kristie.a.hammitt@ci.eugene.or.us
Phone: 541-337-4444

Russ Forrest, City Manager
City of Gunnison, Colorado (pop. 6,000)
Email: rforrest@gunnisonco.gov
Phone: 970-641-8171

Todd Wodraska, Mayor
City of Jupiter, Florida (pop. 60,681)
Email: toddw@jupiter.fl.us
Phone: 561-741-2214

TAB 10

Recent City Management Executive Searches

2018

City/Town Manager or Administrator

- Bethany, Oklahoma (pop. 19,600)
- Craig, Colorado (pop. 8,800)
- Forney, Texas (pop. 17,500)
- Freeport, Texas (pop. 12,000)
- Green Cove Springs, Florida (pop. 7,000)
- Jacksonville, Texas (pop. 14,600)
- Lockhart, Texas (pop. 13,000)
- Marshall, Texas (pop. 24,700)
- Murfreesboro, Tennessee (pop. 131,900)
- Nixa, Missouri (pop. 20,500)
- Paducah, Kentucky (pop. 25,000)
- Pflugerville, Texas (pop. 54,600)
- Smithville, Missouri (pop. 9,000)
- Springfield, Missouri (pop. 167,300)
- Tolland, Connecticut (pop. 15,000)

Deputy/Assistant City or Town Manager

- Boerne, Texas, ACM (pop. 12,800)*
- Lubbock, Texas, ACM (pop. 252,500)
- Odessa, Texas, ACM (pop. 117,700)
- Red Oak, Texas, ACM (pop. 11,500)*
- Temple, Texas, ACM (pop. 73,600)*

2017

City/Town Manager or Administrator

- Bedford, Texas (pop. 49,000)
- Bozeman, Montana (pop. 41,600)
- Brenham, Texas (pop. 16,300)
- Clark County, Washington (pop. 345,000)
- Clute, Texas (pop. 11,000)
- Colleyville, Texas (pop. 24,500)
- Fulshear, Texas (pop. 4,000)
- Grandview, Missouri (pop. 25,300)
- Humble, Texas (pop. 15,000)
- Jupiter, Florida (pop. 60,700)
- Killeen, Texas (pop. 119,000)
- Lebanon, Missouri (pop. 14,300)
- Midland, Michigan (pop. 40,800)
- Parkville, Missouri (pop. 5,400)

- Plant City, Florida (pop. 33,000)
- Riverside, Missouri (pop. 3,000)
- Saginaw, Texas (pop. 21,700)
- San Marcos, Texas (pop. 53,000)
- Sealy, Texas (pop. 6,400)
- Stephenville, Texas (pop. 17,400)
- Temple, Texas (pop. 70,800)
- Topeka, Kansas (pop. 127,000)
- Vail, Colorado (pop. 4,800)

Deputy/Assistant City or Town Manager

- Amarillo, Texas, ACM (pop. 197,250)
- Arlington, Texas, Deputy City Manager (pop. 380,000)
- Hutto, Texas, ACM (pop. 1,800)
- Irving, Texas, ACM (pop. 232,500)
- Rowlett, Texas, ACM (pop. 56,700)
- Taylor, Texas, ACM (pop. 16,500)
- Waxahachie, Texas, ACM (pop. 29,500)
- Waco, Texas, ACM (pop. 126,000)
- Wichita Falls, Texas, ACM (pop. 105,000)
- Duncanville, Texas, ACM (pop. 36,000)*

2016

City/Town Manager or Administrator

- Amarillo, Texas (pop. 189,000)
- Angleton, Texas (pop. 19,000)
- Bastrop, Texas (pop. 8,400)
- Beavercreek, Ohio (pop. 45,000)
- Bethany, Oklahoma (pop. 19,500)
- Canadian, Texas (pop. 2,900)
- Carrollton, Texas (pop. 128,000)
- Choctaw, Oklahoma (pop. 11,500)
- Clarksville, Indiana (pop. 22,000)
- Craig, Colorado (pop. 9,300)
- Davenport, Iowa (pop. 101,000)
- Des Moines, Washington (pop. 29,000)
- Elgin, Texas (pop. 10,000)
- Gunnison, Colorado (pop. 5,500)
- Lake Dallas, Texas (pop. 8,000)
- Lake Worth, Texas (pop. 4,000)
- Palestine, Texas (pop. 18,000)
- Palm Beach Shores, Florida (pop. 1,500)*
- Piney Point Village, Texas (pop. 3,500)

- Raytown, Missouri (pop. 28,000)*
- Spokane Valley, Washington (pop. 90,600)
- Sweetwater, Texas (pop. 10,000)
- Valley Center, Kansas (pop. 5,000)
- Williston, North Dakota (pop. 13,000)

Deputy/Assistant City or Town Manager

- Addison, Texas, DCM (pop. 15,700)
- Chandler, Arizona ACM (pop. (255,000)

2015

City/Town Manager or Administrator

- Abilene, Texas (pop. 118,000)
- Altus, Oklahoma (pop. 19,000)
- Alvin, Texas (pop. 23,000)
- Arcadia, Florida (pop. 7,500)*
- Azle, Texas (pop. 11,500)
- Baytown, Texas (pop. 70,000)
- Ballwin, Missouri (pop. 30,000)
- Bridgeport, Texas (pop. 6,000)
- Casper, Wyoming (pop. 53,500)
- Forney, Texas (pop. 16,000)
- Georgetown, Texas (pop. 50,000)
- Granbury, Texas (pop. 6,800)
- Guthrie, Oklahoma (pop. 10,000)
- Hot Springs, Arkansas (39,000)
- Kaufman, Texas (pop. 8,900)
- Lamesa, Texas (pop. 9,300)
- Missouri City, Texas (pop. 74,500)
- Montgomery, Texas (pop. 600)
- Mount Pleasant, Tennessee (pop. 4,500)*
- Muskegon Heights, Michigan (pop. 11,500)
- Northglenn, Colorado (pop. 34,000)
- Port Lavaca, Texas (pop. 11,000)
- St. Charles, Missouri (pop. 65,000)
- Stillwater, Oklahoma (pop. 46,000)

Deputy/Assistant City or Town Manager

- Bellevue, Washington, DCM (126,600)
- Fort Worth, Texas, ACM (pop. 790,000)
- Georgetown, Texas, ACM (pop. 50,000)
- Waco, Texas, ACM (pop. 129,000)

2014

City/Town Manager or Administrator

- Chapel Hill, Tennessee (pop. 1,500)*
- Converse, Texas (pop. 19,500)*
- Duncanville, Texas (pop. 36,400)
- Fate, Texas (pop. 7,000)
- Galveston, Texas (pop. 56,000)*
- Joshua, Texas (pop. 6,000)
- Kilgore, Texas (pop. 13,000)
- Kyle, Texas (pop. 30,500)
- Lindale, Texas (pop. 5,000)
- Miami, Oklahoma (pop. 13,500)
- Nolensville, Tennessee (pop. 3,100)*
- Port Arthur, Texas (pop. 56,700)
- Port Lavaca, Texas (pop. 11,000)*
- Stephenville, Texas (pop. 17,400)
- Tyler, Texas (pop. 98,800)

Deputy/Assistant City or Town Manager

- Addison, Texas, DCM (pop. 15,700)
- Denison, Texas, ACM (pop. 24,000)
- El Paso, Texas, DCM-Transportation and Public Works (672,000)*
- Manhattan, Kansas, ACM (pop. 56,000)*
- Plainview, Texas, ACM (pop. 3,200)*

2013

City/Town Manager or Administrator

- Bellaire, Texas (pop. 17,000)
- Big Spring, Texas (pop. 27,500)*
- Burien, Washington (pop. 49,000)
- Burkburnett, Texas (pop. 10,500)
- College Station, Texas (pop. 98,000)
- Delray Beach, Florida (pop. 62,000)*
- Fate, Texas (pop. 800)
- Ferris, Texas (pop. 2,500)
- Henderson, Texas (pop. 14,000)
- League City, Texas (pop. 88,000)
- Manhattan, Kansas (pop. 56,000)*
- Owasso, Oklahoma (pop. 31, 500)
- Pearland, Texas (pop. 96,000)
- San Marcos, Texas (pop. 50,000)
- Sikeston, Missouri (pop. 16,000)
- South Padre Island, Texas (pop. 3,000)
- Wills Point, Texas (pop. 3,500)

Deputy/Assistant City or Town Manager

- Amarillo, Texas, ACM- Development Services (pop. 195,000)
- Cape Girardeau, Missouri, ACM-Development Services (pop. 38,500)*
- Cape Girardeau, Missouri, ACM-Administrative Services (pop. 38,500)*
- McKinney, Texas, DCM (pop. 143,000)*
- Orange County, North Carolina, ACM (pop. 138,000)*

*Component based services include, but are not limited to, social media and marketing, application management, psychometric assessments, background investigation reports, media search reports, reference checks, and resume evaluations.

Population numbers are approximate. Resource: www.City-Data.com

Police and Public Safety Related Executive Recruitments

Full Service Searches

- Alice, Texas (pop. 19,000) – Chief of Police (2013)
- Angleton, Texas (pop. 19,500) – Police Chief (2018)
- Arvada, Colorado (pop. 117,000) – Police Chief (2018)
- Austin, Texas (pop. 786,000) – Director of Homeland Security and Emergency Management (2017)
- Bainbridge Island, Washington (pop. 23,000) – Police Chief (2013)
- Blaine, Minnesota (pop. 61,000) – Safety Services Manager/Police Chief (2017)
- Boynton Beach, Florida (pop. 73,000) – Chief of Police (2018)
- Broken Arrow, Oklahoma (pop. 105,000) – Police Chief (2017)
- Eugene, Oregon (pop. 153,000) – Police Chief (2018)
- Fate, Texas (pop. 7,500) – Director of Public Safety (2013)
- Flower Mound, Texas (pop. 65,000) – Police Chief (2013)
- Forney, Texas (pop. 17,500) – Police Chief (2016)
- Irving, Texas (pop. 205,000) – Chief of Police (2017)
- Kalamazoo County Consolidated Dispatch Authority – Executive Director (2015)
- Lakeland, Florida (pop. 93,000) – Chief of Police (2014)
- Levelland, Texas (pop. 12,000) – Chief of Police (2017)
- Lancaster, Texas (pop. 36,000) – Police Chief (2013)
- Memorial Villages Police Department, Texas (pop. 11,000) – Chief of Police (2013)
- North Texas Emergency Communications Center – Executive Director (2016)
- Overland Park, Kansas (pop. 178,000) – Police Chief (2014)
- Plainview, Texas (pop. 21,000) – Chief of Police (2014)
- Pitkin County, Colorado (pop. 15,000) – Emergency Dispatch Director (2016)
- Port Arthur, Texas (pop. 56,000) – Chief of Police (2016)
- Sealy, Texas (pop. 6,000) – Chief of Police (2015)
- Snyder, Texas (pop. 11,500) – Police Chief (2018)
- Spokane, Washington (pop. 203,000) – Police Chief (2016)
- Temple, Texas (pop. 60,000) – Chief of Police (2015)
- Terrell, Texas (pop. 19,500) – Police Chief (2018)
- Victoria, Texas (pop. 62,000) – Assistant Police Chief (2016)

Component Based Searches*

- Arlington, Texas (pop. 380,000) – Assistant Police Chief (2014) and Chief Administrative Officer (2017)
- Azle, Texas (pop. 11,500) – Police Chief (2014)
- Big Spring, Texas (pop. 24,000) – Police Chief (2013)
- Fort Smith, Arkansas (pop. 85,500) – Deputy Director of Police Administrative Services (2018)
- Burleson, Texas (pop. 36,000) – Chief of Police (2014)
- Cape Girardeau, Missouri (pop. 38,000) – Chief of Police (2013)
- Charlotte County, Florida (pop. 141,000) Public Safety Director (2017)
- Chickasha, Oklahoma (pop. 17,000) – Chief of Police (2015)
- Clute, Texas (pop. 10,000) – Police Captain (2016)
- Converse, Texas (pop. 18,000) – Police Chief (2016)
- Dalworthington Gardens, Texas (pop. 2,400) – Chief of Public Safety (2015)
- Edmond, Oklahoma (80,000) – Chief of Police (2016)
- Fort Smith, Arkansas (pop. 87,000) – Police Chief (2016)
- Joshua, Texas (pop. 6,000) – Police Chief (2013)
- Miami, Oklahoma (pop. 12,900) – Chief of Police (2015)
- Midland, Texas (pop. 128,000) – Police Chief (2018)
- Richardson, Texas (pop. 103,000) – Assistant Chief of Police (2016)
- Rockwall, Texas (pop. 36,000) – Chief of Police (2015)
- Rowlett, Texas (pop. 56,000) – Assistant Chief of Police (2013)
- Trophy Club, Texas (pop. 8,000) – Police Chief (2014)
- Victoria, Texas (pop. 62,000) – Assistant Chief of Police (2014)
- Waxahachie, Texas (pop. 29,500) – Chief of Police (2014)
- Westworth Village, Texas (pop. 2,400) – Chief of Police (2104)
- Yoakum, Texas (pop. 5,500) – Police Chief (2014)

Readiness Assessment Process

- League City, Texas (pop. 84,000) – Chief of Police (2012)
- Lenexa, Kansas (pop. 48,000) – Police Chief (2012)
- Richland, Washington (pop. 48,000) – Chief of Police (2011)

*Component based services include, but are not limited to, social media and marketing, application management, psychometric assessments, background investigation reports, media search reports, reference checks, and resume evaluations.

Population numbers are approximate. Resource: www.city-data.com.

Recent Public Works/Utilities/Engineering Related Executive Searches

Full Service Searches

- Alice, Texas (pop. 19,000) – City Engineer (2013)
- Amarillo, Texas (pop. 189,000) – Director of Public Works (2016)
- Bainbridge Island, Washington (pop. 23,000) – Public Works Director (2013)
- Denton County Fresh Water Supply District 1-A, Texas – Director of Public Works (2014)
- Fort Lauderdale (pop. 178,700) – Assistant Public Works Director-Engineering (2018)
- Highland Park, Texas (pop. 9,300) – Director of Engineering (2017)
- Lee County, Florida (pop. 440,000) – Deputy Director of Utilities (2016)
- Missouri City, Texas (pop. 74,000) – Public Works Director/City Engineer (2017)
- Nederland, Texas (pop. 16,000) – Public Works Director (2017)
- Plant City, Florida (pop. 33,000) – Director of Utilities (2016)
- Southlake, Texas (pop. 27,000) – Public Works Director (2015)
- Terrell, Texas (pop. 19,000) – Assistant City Engineer (2013)
- Tyler, Texas (pop. 101,500) – Managing Director of Public Works & Utilities (2017)
- Waco, Texas (pop. 126,000) – Director of Utilities (2015) and Deputy Director of Utilities (2016)

Component Based Searches*

- Abilene, Texas (pop. 118,000) – Assistant Director of Public Works (2015)
- Baytown, Texas (pop. 70,000) – Public Works Director (2015)
- Broken Arrow, Oklahoma (pop. – Streets and Stormwater Director (2018)
- Denison, Texas (pop. 22,500) – Assistant Director of Public Works (2014)
- Durango, Colorado (pop. 16,600) – Assistant Utilities Director (2016)
- Farmers Branch, Texas (pop. 29,000) – Public Works Director (2013)
- Fort Smith, Arkansas (pop. 87,000) – Sanitation Director (2018)
- Fort Smith, Arkansas (pop. 87,000) – Utilities Director (2016)
- Friendswood, Texas (pop. 37,000) – Public Works Director/City Engineer (2014)
- Georgetown, Texas (pop. 50,000) – Public Works Director (2016)
- Lewisville, Texas (pop. 105,000) – Public Services Director (2015)
- Midland, Texas (pop. 108,000) – Engineering Services Director (2013) and Director of Utilities (2014)
- Mountrail-Williams Electric Cooperative, North Dakota – Electrical Engineer (2017)
- Mountrail-Williams Electric Cooperative, North Dakota – Senior Operations Electrical Engineer (2017)
- Pearland, Texas (pop. 45,000) – Director of Projects and Engineering (2014)
- Pflugerville, Texas (54,000) – City Engineer (2016)
- Plainview, Texas (pop. 21,000) – Public Works Director (2016)
- Plano, Texas (pop. 273,000) – City Engineer (2013)
- Red Oak, Texas (pop. 11,500) – Director of Public Works (2018)
- Richardson, Texas (pop. 103,000) – Director of Public Works (2014)

- Shawnee, Kansas (pop. 65,000) – City Engineer (2018)
- Shreveport, Louisiana (pop. 199,000) – Director of Engineering and Environmental Services (2015)
- Shreveport, Louisiana (pop. 199,000) – Director of Public Works (2015)
- Southlake, Texas (pop. 27,000) – Deputy Director of Public Works/City Engineer (2016)
- St. Charles, Missouri (pop. 66,000) – Public Works Director (2016)
- Terrell, Texas (pop. 19,000) – Engineering Project Manager (2014)
- Victoria, Texas (pop. 66,100) – Assistant Director of Public Works (2017)
- Williston, North Dakota (pop. 13,000) – Assistant City Engineer (2017)
- Winter Haven, Florida (pop. 36,000) – Utility Services Director (2018)

*Component based services include, but are not limited to, social media and marketing, application management, psychometric assessments, background investigation reports, media search reports, reference checks, and resume evaluations.

Executive Recruitment Clients

Arizona

- Chandler

Arkansas

- Fort Smith
- Hot Springs

Colorado

- Arvada
- Aurora
- Commerce City
- Craig
- Durango
- Englewood
- Gunnison
- Mountain View Fire Protection District
- Northglenn
- Pitkin County
- Trinidad
- Vail
- Wheat Ridge

Connecticut

- Tolland

Florida

- Arcadia
- Boynton Beach
- Charlotte County
- DeLand
- Delray Beach
- Fernandina Beach
- Fort Lauderdale
- Green Cove Springs
- Hallandale Beach
- Jupiter
- Lakeland
- Lee County
- Palm Beach Shores
- Plant City
- Sunny Isles Beach
- Tamarac
- Winter Haven

Georgia

- Albany

Indiana

- Clarksville

Iowa

- Davenport

Kansas

- Coffeyville
- Hutchinson
- Lenexa
- Manhattan
- Overland Park
- Shawnee
- Topeka
- Valley Center
- Wyandotte County / Kansas City

Kentucky

- Paducah

Louisiana

- Shreveport

Michigan

- Kalamazoo County Consolidated Dispatch Authority (KCCDA)
- Midland
- Muskegon Heights

Mississippi

- Hancock County Port & Harbor Commission

Missouri

- Ballwin
- Cameron
- Cape Girardeau
- Grandview
- Lebanon
- Nixa
- Parkville
- Raytown
- Riverside
- Sikeston
- Smithville
- Springfield
- St. Charles

Montana

- Bozeman

Nevada

- Las Vegas
- Washoe County

New Mexico

- Farmington
- Four Corners Economic Development
- Los Lunas

North Carolina

- Orange County

North Dakota

- Mountrail Williams Electric Cooperative
- Williston

Ohio

- Beavercreek
- Franklin County

Oklahoma

- Altus
- Bethany
- Broken Arrow
- Chickasha
- Choctaw
- Edmond
- Elk City
- Guthrie
- Lawton
- Miami
- Mustang
- Oklahoma Municipal League
- Owasso
- Stillwater

Oregon

- Eugene

Tennessee

- Brentwood
- Chapel Hill
- Mount Pleasant
- Murfreesboro
- Nolensville
- Thompson’s Station

Texas

- Abilene
- Addison
- Alamo Heights
- Alice
- Allen
- Alvin
- Amarillo
- Angleton
- Anna
- Argyle
- Arlington
- Atlanta
- Austin
- Azle
- Bastrop
- Bay City
- Baytown
- Bedford
- Bellaire
- Big Spring
- Boerne
- Breckenridge
- Brenham
- Bridgeport
- Brushy Creek Regional Utility Authority
- Burkburnett
- Burleson
- Burnet
- Canadian
- Canton
- Carrollton
- Cedar Hill
- Cedar Park
- Cleveland
- Clute
- College Station
- Colleyville
- Colorado River Municipal Water District
- Commerce
- Converse
- Copper Canyon
- Corpus Christi
- Dalhart
- Dalworthington Gardens
- Denison
- Denison Chamber of Commerce
- Denton County Fresh Water Supply District 1-A
- Denton
- Duncanville
- El Paso MPO
- El Paso
- Elgin
- Fairview
- Farmers Branch
- Farmersville
- Fate
- Ferris
- Flower Mound
- Forney
- Fort Worth
- Freeport
- Friendswood
- Fulshear
- Gainesville
- Galveston
- Garland
- Georgetown
- Gonzales
- Granbury
- Grand Prairie
- Grapevine
- Greenville

- Gulf Coast Water Authority
- Harris County ESD No. 48
- Henderson
- Hewitt
- Highland Park
- Hudson Oaks
- Humble
- Huntsville
- Hutto
- Hutto EDC
- Ingleside
- Irving
- Jacksboro
- Jacksonville
- Jacksonville Development Corporation (JEDCO)
- Joshua
- Kaufman
- Keller
- Kilgore
- Killeen
- Kyle
- La Porte
- Lake Dallas
- Lakeway
- Lake Worth
- Lamesa
- Lancaster
- League City
- Leander
- Levelland
- Lewisville
- Lindale
- Little Elm
- Lockhart
- Longview
- Lorena
- Lubbock
- Lufkin
- Marshall
- McKinney EDC
- McKinney
- Memorial Villages PD
- Midland
- Midlothian EDC
- Missouri City
- Montgomery
- Mount Pleasant
- Mount Pleasant EDC
- Nederland
- North East Texas Regional Mobility Authority (NET RMA)
- North Richland Hills
- North Texas Emergency Communications Center (NTECC)
- Odessa
- Palestine
- Paris
- Pearland
- Pflugerville
- Piney Point Village
- Plainview
- Plano
- Port Arthur
- Port Lavaca
- Port Neches
- Prosper
- Red Oak
- Richardson
- Richland Hills
- Riverbend Water District
- Rockport
- Rockwall

- Round Rock
- Rowlett
- Royse City
- Sachse
- Saginaw
- San Angelo
- San Marcos
- San Marcos/Hays County EMS
- Seabrook
- Seagoville
- Sealy
- Snyder
- Socorro
- South Padre Island
- Southlake
- Stephenville
- Sugar Land
- Sweetwater
- Tarrant County 9-1-1 District
- Taylor
- Temple
- Terrell
- TexAmericas Center
- Texarkana
- The Woodlands
- Tomball
- Trophy Club
- Tyler
- Van Alstyne
- Victoria
- Waco
- Waxahachie
- Weatherford
- West Lake Hills
- Westlake
- Westworth Village
- Wichita Falls
- Willow Park
- Wills Point
- Yoakum

Washington

- Bainbridge Island
- Bellevue
- Burien
- Clallam County
- Clark County
- Des Moines
- Richland
- Shoreline
- Snoqualmie
- Spokane
- Spokane Valley
- Whitworth Water District #2

Wyoming

- Casper

Other Organizations

- Institute for Building Technology and Safety (IBTS)

Executive Recruitment Positions

Administration

- Assistant City Manager
- Assistant County Manager
- Chief Administrative Officer
- City Administrator/City Manager/Town Manager
- City Secretary
- Deputy City Manager
- Director of Administration
- Executive Director

Administrative Services/Internal Services

- Administrative Services Director
- Arts Director
- Assistant Police Director
- Chief Medical Examiner
- Event/Marketing Specialist
- Intergovernmental Services Manager
- Management Assistant
- Manager of Town Services

Airport

- Airport General Manager

Animal Services/Environmental Health

- Animal Services Manager
- Animal Shelter Manager
- Animal Welfare Manager / Director
- Assistant Director of Code Compliance/Animal Welfare
- Director of Animal Care and Control
- Director of Regional Animal Services
- Environmental Health Director
- Executive Director of Animal Services

Development Services

- Assistant Director of Planning and Development
- Assistant Property Management Director
- Building Official / Chief Building Official
- City Inspector
- Community Development Director/Manager
- Deputy Director of Development Services
- Development Services Director
- Municipal Services Director
- Neighborhood Services Director
- New Urbanist
- Planning & Community Development Director
- Property Management Director
- Redevelopment Project Manager
- Senior Building Inspector / Building Inspector
- Tourism and Community Development Director

Economic Development/CVB

- Assistant Economic Development Director
- Chamber of Commerce President
- CVB Executive Director
- Director of the Office of ED (County)
- Downtown Development Director
- Economic Development Corporation President/CEO
- Economic Development Director/Executive Director
- Economic Development Manager

- Executive Director of Port & Harbor Commission
- Senior Redevelopment Project Manager
- Vice President/Chief Econ Development Officer

Finance

- Accounting Services Supervisor
- Assistant Director of Finance
- Budget Director / Manager / Officer
- Capital Projects Budget Manager
- Chief Financial Officer
- Deputy Director of Finance
- Finance Controller / Auditor / Comptroller
- Finance Director/Finance Officer
- Finance Manager
- Purchasing Manager
- Senior Accountant
- Senior Budget Analyst
- Treasury Supervisor

Human Resources/Civil Services

- Assistant Human Resources Director
- Chief Performance Officer
- Director of Human Resources & Risk Management
- Human Resources/Civil Services Director

Information Technology

- Chief Information Officer
- Chief Technology Officer
- GIS Manager
- IT Assistant Director
- IT Developer / Director / Manager
- IT Manager (Police Department)
- Senior Software Developer

Innovation, Process Improvement & Sustainability

- Chief Knowledge Officer

Legal

- Assistant City Attorney
- City Attorney (Individual and Firm)
- Court Administrator
- Director of Municipal Court Services
- First Assistant City Attorney

Library

- Librarian
- Library Director
- Senior Librarian

Marketing and Community Engagement

- Community Relations Manager
- Community Services Administrator
- Community Services Director
- Director of Community Affairs
- Director of Marketing and Community Engagement
- Public Information Officer
- Public Relations Coordinator

Metropolitan Planning Organization

- Director of Metropolitan Planning Organization

Museum

- Museum Director

Parks and Recreation

- Assistant Director of Parks and Recreation
- Parks and Recreation Director

- Park Superintendent
- Program Area Manager (Parks)
- Recreation Superintendent

Public Safety/EMS/Emergency Management

- Assistant Fire Chief
- Assistant Police Chief
- Battalion Chief
- Chief of Public Safety
- Deputy Director, Emergency Communications
- Deputy Director - Police Administrative Services
- Emergency Dispatch Director
- Emergency Management Coordinator
- EMS Executive Director
- Executive Director, Emergency Communications
- Fire Chief
- Homeland Security and Emergency Management Director
- Lieutenant
- Police Chief
- Public Safety Director
- Safety Services Manager

Public Works/Utilities/Engineering

- Assistant City Engineer
- Assistant General Manager for Water District
- Assistant Utilities Director
- Chief Plant Operator
- City Engineer
- City Planner
- City Services Director
- Deputy Director of Public Works/City Engineer
- Deputy Director of Utilities
- Director of Engineering & Environmental Services
- Director of Projects & Engineering
- Director of Public Services
- Director of Utilities
- Electric Utility Director
- Electrical Engineer
- Engineering Project Manager
- Engineering Services Manager for Water District
- Planning & Engineering Director
- Planning Manager
- Public Works Assistant Director
- Public Works Director
- Public Works Director/City Engineer
- Sanitation Director
- Utility Services Director
- Water District Executive Director
- Water District General Manager

Transportation/Fleet Services

- Assistant Municipal Garage Superintendent
- Director of Operations and Maintenance
- Director of Street Operations
- Equipment Services Manager
- Facilities Services Manager
- Fixed-Base Operator Services
- Fleet Equipment Services Manager
- Fleet Services Manager
- Senior Transportation Planner
- Streets and Stormwater Director
- Transportation Manager

TAB 11

UNSOLICITED FEEDBACK REGARDING SGR'S PERFORMANCE

Following are a few unsolicited quotes from emails we have received. This unsolicited feedback demonstrates that our practice of using the Golden Rule to determine how we treat everyone leaves no doubt in the minds of both clients and candidates that we are truly superior to the competition. We do not include names to avoid the suggestion of an endorsement, which is prohibited under the ICMA Code of Ethics.

December 2017: "I was impressed with the professionalism and thoroughness of your company. I am very pleased with where we ended up. I was a little nervous entering the process. But it turned into a very positive experience for the Council and the City."

May 2017: "Thanks so much for SGR's help. We had dozens of well qualified applicants, and most would probably not have been received without the support and expertise of SGR. The contacts and network that SGR brought to the process were invaluable. [Recruiter] was a joy to work with. He was extremely professional and knowledgeable. He guided us through the process and kept us on the preset timeline."

May 2017: "…I do appreciate your and you company's professionalism, but more importantly the thoughtfulness and personal attention you provide candidates, which I'm sure is equally provided to your client. That attention is often lacking in other municipal search firms and is a great attribute of SGR."

May 2017: "Thanks for the update. I have to admit, I've never received a status update note from a recruiter providing such an informative message about what is happening with the position. I really appreciate it and as a human resources professional, I'll tuck this thought away for future reference as a best practice."

May 2017: "Thank you so much for sharing the article. I haven't seen another executive recruitment firm be so proactive and engaged with job candidates. Very impressive."

April 2017: "Ron, I thought I would reinforce to you, how much I appreciate the way your staff, like [recruiter] and others, stay in touch with applicants throughout the process. You are unique in the current trends of electronic application systems but some are operated by people not functioning like "Servant leaders"! Your staff gets the concept and walks the walk! Thanks for your "Servant leadership" and its impact on the HR leadership."

February 2017: "[t]hank [recruiter] and Ron Holifield for your professionalism and timely attention to my inquiries and concerns…I sincerely appreciate the firm's commitment to its clients and the applicant pool."

January 2017: "Thanks to your company for all of the opportunities that they allowed me during my brief stint amongst the unemployed. You have amazing people working for you."

December 2016: “I truly value your level of communication in this process. I’d not realized my commitment to communication until being in a position where there is an extreme lack of communication and I have no way to foster. So thank you for being one of the few examples of how it can be done.”

October 2016: “A special thank you to [recruiter]. He was very helpful during this process. I will definitely be recommending SGR to my professional colleagues.”

August 2016: “Thank you very much for your continuous update on the status of my application for the [position] and I really appreciate the commitment by your team and yourself to make this a wonderful experience. I admire your level of professionalism and hope that I get a chance to work among such a wonderful team in future.”

July 2016: “I also appreciate your engagement with me as a candidate during this process. It has been one of the most professional experiences with a recruiter I have had. You should be commended for your efforts to lead such an effort. In the future, if I ever need assistance to fill a position, I will surely keep you in mind.”

July 2016: “The more I deal with you, Ron, and the rest of your team, the more impressed I am with your level of professionalism and care. You are awesome.”

June 2016: “I have been very impressed with your selection process. This has been a very time consuming process for candidates like me but I see a great value for the employers. You have developed a great selection process. Honestly, when I compare it to what my colleagues and I have done at Big 4 firms, your process is more comprehensive and much better.”

May 2016: “I just wanted to take a moment of your time to thank you for your very professional demeanor while conducting the job search for the [city]. SGR is very thorough. I am impressed by the diligence of SGR. All interviews are a continuing learning process; I have learned from this experience, especially the video interview. You all are very kind; and, I wanted you to know that I appreciate having this experience and appreciated the interaction with everyone at SGR.”

April 2016: “I must say, this has been one of the most professional and well organized recruiting processes I have seen in a very long time. You and your team have kept the candidates abreast of the process completely along the way. Thank you kindly for going the extra mile to make this a very pleasant experience. You and your team represent the HR profession amazingly. Simply impressive.”

March 2016: “Thank you for the update. I wanted to let you know that I truly enjoyed your recruitment style. You are timely and informative. The information sent by yourself and [SGR staff] is relevant and a wonderful way to keep potential candidates ‘warm’ while you evaluate resumes.”

February 2016: “I just wanted to say how nice it is to get updates on the status of the search. I'm in the process of looking at several positions and it can be very frustrating to sometimes go months without knowing if the organization has chosen anyone. (Many places will not return calls or emails inquiring about status, either.) No matter the outcome, this is definitely one of the best run searches I have been a part of. Thanks again for keeping us all in the loop.”

January 2016: “I would like to say that I really appreciate the level of communication from you and SGR regarding the status of the process in [city] and what the expected next steps were. I have dealt with a number of search firms over the last year and SGR has done an excellent job in communicating with applicants. Far too often I have heard nothing from the firm conducting a search and found out through other sources that the position had been filled. Again I really appreciate the level of communication.”

TAB 12

BOZEMAN MT

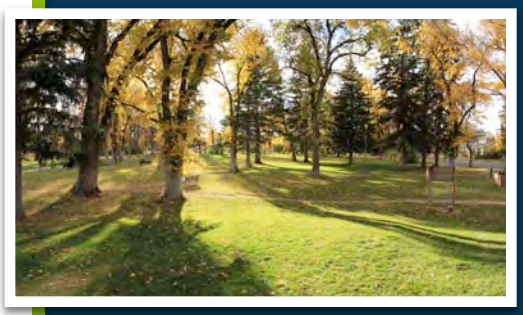
CITY MANAGER

POSITION PROFILE

THE COMMUNITY

Beautifully situated on the eastern slope of the Rocky Mountains, scenic Bozeman, Montana, covers over 18 square miles and is the county seat of Gallatin County, the most populated and fastest growing county in southwest Montana. It is located 143 miles west of Billings, 200 miles east of Missoula, and is just 90 minutes from Yellowstone National Park. The City is part of the Bozeman Micropolitan Statistical area and home to 45,250 residents. The City boasts great connectivity, with Bozeman Yellowstone International Airport just ten minutes west of Bozeman. Residents of Bozeman enjoy a high quality of life, outstanding recreational offerings, nationally-recognized public schools, and unmatched cultural amenities.

Bozeman has experienced considerable growth in the last few years and is now the fourth largest city in the state. The City's economy is supported primarily by agriculture, but there has been significant growth in tourism and the high-tech industry. The region has drawn numerous tech start-ups looking for a Silicon Valley alternative, and Bozeman has become the high-tech center for the state. The area's largest employers include Montana State University, Bozeman Public School District, City of Bozeman, Bozeman Deaconess Hospital, and Oracle America, Inc.



Bozeman has received numerous awards and accolades over the years in recognition of its livability and natural attractions, including a high ranking in *Livability's* "Top 100 Best Places to Live for 2015" and *National Geographic's* "World's 25 Best Ski Towns." The area often receives such recognition because of the easy access to fly-fishing, skiing, hunting, hiking, camping, climbing, canoeing, and kayaking.

Bozeman averages 300 days of sunshine each year and is an ideal location for outdoor enthusiasts. From hiking and skiing to mountain biking and fishing, Bozeman offers unmatched outdoor recreation amenities in a picturesque setting. Bozeman residents are within easy distance of a number of cross-country and downhill ski centers and trails in the region, including Bridger Bowl and Big Sky Resort, which merged with Moonlight Basin in 2013 to form the largest ski resort in the United States. The City of Bozeman parks system consists of 42 public parks, 52 miles of trails, numerous sports fields and open spaces, ice rinks, and off-leash dog parks, as well as three community garden areas with plots available for the public to rent during the summer. The Recreation Division provides great opportunities for outdoor recreation, sports, fitness, and cultural arts, with a variety of special programs such as archery, stand up paddle boarding, senior fitness, and women's fly-fishing. Yellowstone National Park is just 90 minutes from Bozeman and offers an endless variety of activities and stunning vistas.

Area students are served by Bozeman Public Schools, which is composed of one high school, two middle schools, and eight elementary schools. The district provides quality education and a variety of extracurricular activities for over 6,000 students. Taxpayers recently approved a bond that will build a new high school as well as improve the existing high school. *Newsweek* and other publications have repeatedly ranked Bozeman High School one of the best high schools in the nation. Several private schools also operate in the area, including Mount Ellis Academy, a co-ed boarding school serving grades 9-12, and Headwaters Academy. For those seeking higher education, Montana State University's main campus is in Bozeman. MSU offers significant opportunities for research, scholarship, and creative work, with 60 areas of study for undergraduates and over 40 master's programs.

Bozeman has a median home value of $259,800 and a median household income of $45,279.

GOVERNANCE & ORGANIZATION

The City of Bozeman operates under the City Charter, which was adopted in its current form in 2006, as a city commission-city manager form of government with self-governing powers. The City Commission is composed of four members and a Mayor who are all elected at-large. At every regular city election, a mayor is elected for a term of four years and serves as a Deputy Mayor and a Commissioner for the first two years of the term and Mayor for the balance of the term.

A professional City Manager is selected by and reports to the City Commission. The City Manager oversees and directs the City's organizational, leadership, management, budgetary, and administrative operations and supervises the Assistant City Managers, City Attorney, and other program administrators and administrative support personnel.

The City has 416 employees and a budget of $106 million.

MISSION

To enhance the quality of life through excellence in public service.

LEADERSHIP & INNOVATION

The City has outlined a strategic plan, which the incoming City Manager will support and implement with both short and long-term initiatives:

An Engaged Community. Bozeman fosters a culture of engagement and civic leadership based on innovation and best practices involving community members of all backgrounds and perspectives.

An Innovative Economy. The City grows a thriving, diversified, and innovative economy leveraging its natural amenities, skilled and creative people, and educational resources to generate economic opportunities.

A Safe, Welcoming Community. Bozeman embraces a safe, healthy, welcoming, and inclusive community.

A Well-Planned City. We consistently improve our community's quality of life as it grows and changes, honoring our sense of place and the 'Bozeman feel' as we plan for a livable, affordable, more connected city.

A Creative, Learning Culture. The City expands education, arts, expression, and creativity for all ages.

A Sustainable Environment. We cultivate a strong environmental ethic; protect our clean air, water, open spaces and climate; and promote environmentally sustainable businesses and lifestyles.

A High-Performance Organization. We operate as an ethical high-performance organization, anticipating future needs, utilizing best practices and striving for continuous improvement.

IDEAL CANDIDATE

The City of Bozeman seeks an energetic, diplomatic leader with strong team building skills to be its next City Manager. The ideal candidate will be ethical, forward-thinking, and committed to the continual improvement of the organization and its staff. The new City Manager will lead the City with a high degree of honesty, integrity, and decisiveness and guide it on the path to sustainable growth and development. A candidate with experience managing a large or comparably-sized city that has experienced rapid growth is desired.

The selected candidate must have significant growth management experience, with the ability to deal with the challenges and opportunities that come with the pressures of population and government growth, and must have the organizational skills needed to prioritize projects, making the most effective and efficient use of staff and financial resources. The City Manager will actively seek unique and innovative solutions and utilize past experiences to build on the positive aspects of the City. The City Manager should be willing to make concise decisions and must have the ability to clearly communicate those decisions to a variety of audiences. Experience with land use planning and zoning regulations is a plus.

The City has a dedicated staff who is invested in the future of Bozeman. The new City Manager will demonstrate the same level of enthusiasm for the City of Bozeman and will be visible, engaged, and involved in the community. The ideal candidate will view service to the community and servant leadership as guiding principles in his or her approach to management. The next City Manager should not only lead the organization but also play a key role in leading the community and will execute the priorities of the City Commission, which represent the citizens of the City, with vigor, positivity and vision.

The City Manager will appreciate and successfully utilize the knowledge and experience of a highly-skilled and talented staff, providing mentoring and development opportunities for employees to reach their full potential and encouraging a culture of accountability at all levels. The selected individual will unite the organization with a shared sense of purpose and vision for the future of Bozeman. The City Manager will anticipate issues and strategically engage team members in the problem-solving process to ensure positive outcomes.

A trust builder who can foster a collaborative environment throughout the organization, the new City Manager will unite staff with a shared sense of purpose while promoting teamwork, trust, and honesty. The new City Manager will focus strongly on building trust with the Commission, staff, and the community. The chosen candidate will have a successful track record of building relationships with other agencies such as universities, counties, local school districts, and other organizations. A strong background in managing commission relations is essential.

VISION

Bozeman remains a safe, inclusive community, fostering civic engagement and creativity, with a thriving, diversified economy, a strong environmental ethic, and a high quality of life as our community grows and changes.

IDEAL CANDIDATE, continued

A strong communicator, the City Manager will have exceptional listening, writing, and speaking skills and will facilitate clear, positive, and consistent communication between the Commission and department directors. The chosen candidate will possess the self-awareness to recognize his or her own strengths and weaknesses and the emotional intelligence to learn from past mistakes.

EDUCATION & EXPERIENCE

A master's degree in public administration, business administration, or a closely related field and a minimum of seven (7) years of experience in management, preferably in the public sector at the local government level, are required. Any equivalent combination of experience and training which provides the knowledge, skills, and abilities necessary to perform the work will be considered. The selected candidate must complete a financial disclosure form as a condition of employment and must reside within the Bozeman city limits by no later than the date of the first performance evaluation, which is anticipated to occur 12 months from the date of initial employment.

COMPENSATION & BENEFITS

The City of Bozeman offers a competitive salary commensurate with qualifications and experience. A range of health, dental, vision, and life insurance, as well as a generous leave package and other benefits, is provided.

APPLICATION PROCESS

Please apply online at: http://bit.ly/SGRCurrentSearches

For more information on this position contact:

Ron Holifield, CEO
Strategic Government Resources
Ron@GovernmentResource.com
214-676-1691

This position is open until filled. To view the status of this position, please visit: http://bit.ly/SGRCurrentSearches

The City of Bozeman is an Equal Opportunity Employer and values diversity in its workforce. Applicants selected as finalists for this position will be subject to a comprehensive background check.

RESOURCES

City of Bozeman
www.bozeman.net

Bozeman Area Chamber of Commerce
www.bozemanchamber.com

Bozeman Convention & Visitors Bureau
www.bozemancvb.com

Downtown Bozeman
www.downtownbozeman.org

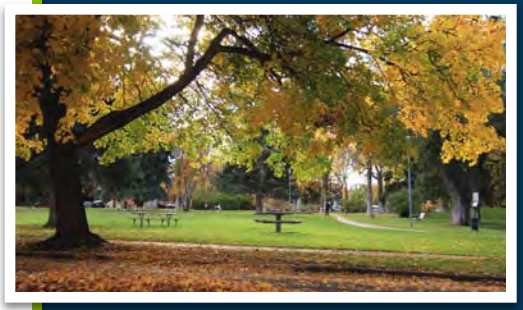
CORE VALUES

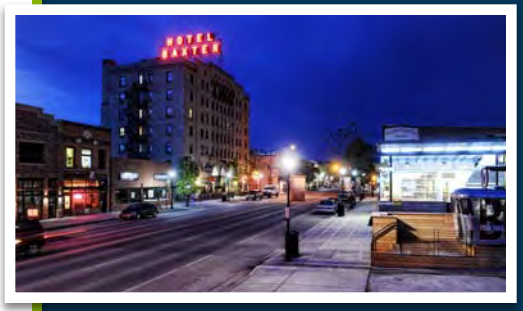
Integrity: Be honest, hardworking, reliable, and accountable to the public.

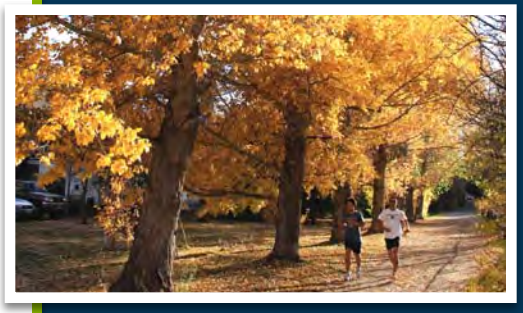
Leadership: Take initiative, lead by example, and be open to innovative ideas.

Service: Work unselfishly for our community and its citizens.

Teamwork: Respect others, welcome citizen involvement, and work together to achieve the best results.







BOZEMAN MT

CITY OF EUGENE, OREGON

CHIEF OF POLICE

EXECUTIVE SEARCH PROVIDED BY STRATEGIC GOVERNMENT RESOURCES

COMMUNITY

Home to 165,000 people, Eugene is Oregon's third largest city. The community covers 41 square miles, with the Willamette River running through the heart of the city and the McKenzie River joining the Willamette just north of town. The city is surrounded on three sides by hills, and is midway between the Pacific Ocean and the snow-capped Cascade Mountains. It offers residents an outstanding quality of life and a wide variety of recreational opportunities nearby including rafting, fishing, golfing, hiking, skiing, and beachcombing. Eugene's mild climate and lush landscape are some of the city's attractive features.

Eugene is well-known as the home of the University of Oregon, Lane Community College, and Northwest Christian College. With over 30,000 students between them and over 6,000 employees, these higher education institutions play a major role in the community. The University has its own police department that operates independently but in partnership with the Eugene Police Department.

Eugene has a well-educated labor force with nearly 40% of the adult population having completed four or more years of college. Eugene's employment base includes services, trade, government, and a growing technology sector. In 2017 the City of Eugene partnered with other agencies to install the latest advancement in internet technology, a municipally owned high speed fiber network in downtown. This provided an exciting addition to the recently redeveloped downtown core.

Eugene is home to friendly, progressive residents who enjoy the healthy, high-quality of life, first-rate services, cultural diversity, and world-class arts and cultural amenities that the City provides. The City's Hult Center for the Performing Arts, recognized as one of the finest facilities of its type in the state, brings renowned entertainers to the community throughout the year. It is home to seven Oregon resident companies, including, among others, the Eugene Symphony, Opera, Ballet, and the internationally acclaimed Oregon Bach Festival. Many residents are health and fitness-oriented, and Eugene hosted the Olympic Trials for Track and Field in 2008, 2012 and 2016 and is slated to host the World Track and Field Championships in 2021. Eugene is a community with quality schools, a beautiful environment, a temperate climate, and a diverse, dynamic culture.

GOVERNANCE

In 1944, the citizens of Eugene adopted a council/manager form of government. In this form of government, the City Council provides policy direction to the City Manager. The City Manager oversees City of Eugene personnel and operations, as well as the organization's budget, and implements the City Council's goals and priorities.

The Mayor serves as the City's political head and chair of the eight-member Council. The Mayor, elected by the city at large on a nonpartisan ballot for a four-year term, is the formal representative of the city. Councilors are elected by ward on a nonpartisan ballot to four-year staggered terms.

ORGANIZATION

With over 1,400 employees and a $570 million total budget, the City of Eugene is a service-oriented welcoming organization that reflects a diverse porfolio of operations through six departments.

- Central Services
- Fire & Emergency Medical Services
- Police
- Library, Recreation and Culture Services
- Planning and Development
- Public Works

Services provided by City staff are focused on implementing Council goals of safe community, sustainable development, accessible and thriving culture and recreation, effective accountable municipal government, and fair, stable and adequate financial resources. This is accomplished through an extensive number of programs and initiatives with a focus on adapting to the changing needs of our community.

Eugene
OREGON

#8 LIVABILITY
Eugene ranked #8 Best Places to Live & Visit in 2013 (Livability.com)

WEATHER
Average annual high temp: 63.3˚F
Average annual low temp: 41.7˚F

POPULATION
165,000 people

EDUCATION
Nearly 40% of the population has a four-year degree

SCHOOLS
Two school districts and three higher education institutions

HOME PRICES
$280,000 Zillow home value index

ATTRACTIONS

- 45 miles of off-street bike paths
- 4,000+ acres of parkland
- Hayward Field world class track venue
- 82 local arts and cultural organizations

OUTDOORS

Two rivers

60 miles to the coast

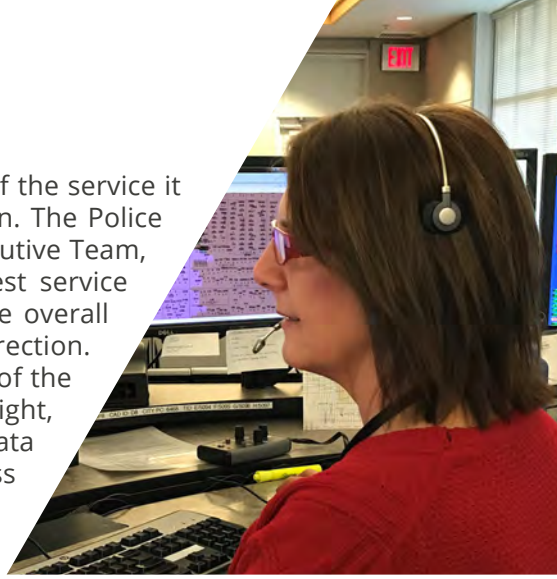
70 miles to the Cascade Mountains

TRANSIT

Over 900,000 yearly passengers fly through the Eugene airport.

Train and bus providers include Amtrak, Greyhound, and Bolt bus.

ABOUT THE OPPORTUNITY



This is an opportunity to lead a dedicated Police Department that is proud of the service it provides to one of the most vibrant and engaged communities in the nation. The Police Chief reports directly to the City Manager and as a member of Eugene's Executive Team, shares the responsibility to lead the City organization and provide the best service possible to the community. This includes supporting strategies that balance overall organization and community well-being in alignment with Council policy and direction. The Police Chief is responsible for the overall leadership and administration of the Police Department. Major responsibilities include daily operational oversight, optimization of management of personnel and resources, implementing data driven strategies including short and long-term strategic planning to address crime trends and quality of life issues in partnership with internal and external stakeholders. The City of Eugene also has a well-established civilian oversight structure that includes a Police Auditor and Civilian Review Board.

ABOUT THE DEPARTMENT

A progressive, professional law-enforcement agency, the Eugene Police Department has a strong tradition of providing quality police service for the Eugene community. A state-of-the art Emergency Communications Center serves the department, Eugene/Springfield multi-jurisdictional Fire/EMS, and other regional public safety agencies. In fulfillment of the public trust, the department works in partnership with the community to promote safety and security, enforce laws, prevent crimes, and safeguard the constitutional rights of all people.

In the typical day, Eugene Police officers are dispatched on average to about 340 calls for service. This activity generates about 21,000 criminal cases every year. Department staff members also engage in proactive community education and crime prevention activities to help protect Eugene's residents.

The department employs about 190 sworn officers and 140 civilian employees who provide a variety of police services with an operational budget of over $50 million. The department has received state and national recognition for its outreach to vulnerable communities and its Volunteers in Policing program. Current divisions include patrol, investigations, operations support, and technical services which includes 911. Special units include: Patrol Canine Team, Crisis Negotiation Team, SWAT Team, School Resource Team, Traffic Enforcement Unit, Arson Team, Explosive Disposal Unit, and Major Collision Investigation Team.

CHALLENGES AND OPPORTUNITIES

The next Police Chief will find Eugene a diverse and progressive city. The new Police Chief will work diligently to ensure the continued safety for all Eugene residents reflective of 21st Century Policing practices. The next Police Chief will work with community stakeholder groups, other agencies, regional law enforcement partners, social service providers, and other City departments to develop and implement innovative and people centered solutions. Like many communities, Eugene has seen growth in its homeless population. The City of Eugene efforts to address this community challenge will include an area-wide project to explore alternative solutions for homelessness.

In addition, the new Police Chief will:

- Utilize data and analysis to assess, address, and advocate for staff resource needs in support of achieving organizational goals and initiatives for the community justice system.
- Prioritize and enhance training and ongoing eduction for everyone in the department.
- Help develop a culture within the department of collaborative problem-solving and compassionate service that seeks improved outputs and enhances community trust.
- Provide culturally responsive training to best serve communities of color, LGBTQ communities, immigrants, Muslim and Jewish communities, residents with mental health issues, individuals experiencing addictions, and other underserved communities.
- Further develop and implement strategies that prioritize and reinforce the department's commitment to de-escalation.
- Identify gaps and increase training and well-functioning accountability mechanisms for the entire department to ensure it is engaged in understanding and applying procedural justice, increasing legitimacy and trust, and other comprehensive reforms as outlined in the report by the President's Task Force on 21st Century Policing.

IDEAL CANDIDATE

The City of Eugene is seeking a committed, decisive, and service-oriented Police Chief who will lead the department with integrity, vision, consistency, and honesty. This is a great opportunity for an experienced, well-respected law enforcement professional who expects nothing but the best from and for all police employees. The new Police Chief will utilize best practices and strategic planning processes to help the City successfully adapt to existing and future changes. The successful candidate will unite the department with a shared vision and must demonstrate the ability to lead the department with fairness and compassion in a way that builds trust.

The successful candidate will have an inclusive and authentic leadership style with an in-depth understanding of the changing workforce and will be able to lead, inspire, and develop Police Department personnel to provide for the growing and changing needs of the organization. It is essential that the new Police Chief promote and maintain excellent training along with a good leadership development program to mentor and instill high quality leadership throughout the department that builds a strong succession plan at all levels of the organization.

The Police Chief will have exceptional interpersonal skills and the flexibility needed to perform at a high level in an environment of change. The successful candidate will foster a culture of accountability at all levels of the organization and must have a proven record of implementing progressive policing strategies and building a positive culture of continuous learning and improvement that is focused on exceptional service and collaboration. The chosen candidate will be invested in the future success of Eugene, and highly visible in the department and the community.

The next Police Chief will lead efforts to work collaboratively with the community, and all segments of the justice system and social services, to implement creative solutions for crime and quality of life concerns. To supplement this effort, the Police Chief will be an analytical thinker who is comfortable using accurate data to drive evidence-based decisions to establish clear and consistent priorities that make the best use of staff and financial resources.

It will be important for the new Police Chief to be highly engaged with Eugene's residents and organizations, including the University of Oregon and its Police Department, to gain an understanding of this diverse community, and proactively address the differing needs from neighborhood to neighborhood. The Police Chief will build and maintain critical relationships with residents and staff, as well as with local, regional, state, and other governmental partners. We are looking for a person who models and expects open and transparent communication inside and outside the department and handles sensitive issues with respect and diplomacy.

The next Police Chief will uphold and nurture the City's community policing philosophy with a focus on the pillars of 21st Century Policing. As a part of this philosophy, the Chief will lead the department in making genuine community connections in a complex community environment. Inspiring the department to be accountable to these philosophies is of the utmost importance. The new Police Chief will intentionally build relationships with community partners, communicate in a consistent and timely fashion and proactively address issues as they arise. This philosophy will guide and inform the delivery of police services while building trust and enhancing safety. The chosen candidate will demonstrate a continued commitment to recruiting and retaining a highly trained workforce that reflects the diversity of the community now and in the future.

EDUCATION AND EXPERIENCE

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

EXPERIENCE: Ten years of law enforcement experience which must include a minimum of three years experience as full-time lieutenant or higher, or an equivalent combination of education, training and experience.

TRAINING: Equivalent to a Bachelor's degree from an accredited college or university in police science, criminal justice, public administration, or a closely related field. Master's degree or FBI National Academy training is highly desirable.

LICENSE OR CERTIFICATE: Possession of or ability to obtain, and maintain an appropriate, valid Oregon driver's license.

Possession of, or ability to obtain within 12 months of appointment, an Executive Certificate from the Oregon Department of Public Safety Standards and Training (DPSST).

If selected, the applicant must meet the standard to be licensed as a peace officer in the State of Oregon within 12 months. Out of state applicants should view the Oregon Department of Public Safety Standards and Training (DPSST) for an explanation of requirements at www.oregon.gov/dpsst/SC/pages/inde.aspx

SGR

COMPENSATION AND BENEFITS

The City of Eugene offers a competitive salary depending on qualifications and experience. A comprehensive benefits package is provided.

APPLICATION PROCESS

Please apply online at: bit.ly/SGRCurrentSearches

Priority screening begins January 12, 2018.

For more information on this position contact:

Larry Boyd, Senior Vice President
Strategic Government Resources
LarryBoyd@GovernmentResource.com
469-261-5113

The City of Eugene is an Equal Opportunity Employer and values diversity in its workforce. Applicants selected as finalists for this position will be subject to a comprehensive background check.

RESOURCES AND ADDITIONAL INFORMATION

City of Eugene
eugene-or.gov

Eugene Police Department
eugene-or.gov/162/Police

Eugene Police Chief Recruitment
eugene-or.gov/policechiefrecruitment

Follow Us

TAB 13

Background Screening Report

First Check
PO BOX 92033
Southlake, TX 76092
Phone: 888-588-2525 / 888-588-2525
Fax: 888-213-9341

FILE NUMBER	70100	REPORT DATE	04-02-2015
REPORT TO	STRATEGIC GOVERNMENT RESOURCES (20002) 1117 Bourland Rd Keller, TX 76248 Phone: 214-676-1691 Fax: -	ORDER DATE	04-02-2015 MELISSA VALENTINE
		TYPE	EXECUTIVE SEARCH - BACKGROUND CHECK

Application Information

APPLICANT	TESTCASE, JANET	SSN	XXX-XX-6789	DOB	10-05-1962
ADDRESS(ES)	19 FOREST DR	CITY / STATE / ZIP	BEDROCK, TX 75214		

Identity Development

Person Search - SSN TRACE/ ADDRESS VERIF

RESULTS **Records Found**
SSN SEARCHED XXX-XX-6789 SEARCH DATE 04-02-2015 1:48 PM MDT

Applicant Information

FULL NAME / SSN	DOB	ADDRESS	PHONE	REPORTED DATE(S)
JANET TESTCASE		19 FOREST HILL BEDROCK, TX County: HIDALGO		First: 2015-01-16 Last: 2015-04-02
JANET LYNN TESTCASE	1962-10-05	19 FOREST HILL BEDROCK, TX County: HIDALGO	(954)547-3984	First: 1995-02-13 Last: 2015-04-02
JANET TESTCASE	1962-10-05	19 FOREST HILL BEDROCK, TX County: HIDALGO		First: 1995-02-13 Last: 2015-04-02
JANET L TESTCASE		7863 SLEEPING LILY DR LAS VEGAS, MO 89178 County: JACKSON	(702)812-1460	First: 1991-12-31 Last: 1996-05-23

SSN Information

SSN	VALID	ISSUED LOCATION	ISSUED DATE RANGE
XXX-XX-6789	Y		1975-1976

WARNING: This search may not be used as the basis for an adverse action on an applicant. It should only be used to verify or correct an applicant's information, or as a tool to further research of public records or other verifications.

Credit

Credit Summary

TOTAL TRADELINES	0	30 DAYS LATE	0
CURRENTLY SATISFACTORY	0	60 DAYS LATE	0
CURRENTLY DELINQUENT	0	90 DAYS LATE	0
PREVIOUSLY DELINQUENT	0	NEWEST TRADE	
COLLECTION/CHR OFFS	0/0	OLDEST TRADE	
PUBLIC RECORDS	0	INQUIRIES	0

Financial Summary

	#	PAYMENT	TTL BALANCE	PAST DUE	UTILIZATION
MORTGAGE	0	$0	$0	$0	
INSTALLMENT	0	$0	$0	$0	
OPEN	0	$0	$0	$0	
REVOLVING	0	$0	$0	$0	
OTHER	0	$0	$0	$0	
	0	$0	$0	$0	

Warning; Use careful judgment the past due column of this financial summary may possibly combine amounts of an original creditor with amounts from a collection agency collecting for the original creditor. A single debt could be included as a trade amount and with the collection agency. In a few cases, this single debt can appear as a judgment in the public records section, as well.

Variations

Personal Information Comparison

	NAME	SOC SEC	DOB	AKA
APPLICANT	TESTCASE, JANET	XXX-XX-6789	10/05/1962	
TU	TESTCASE, JANET	MISMATCH		

Address Comparison

		ADDRESS	REPORTED
APPLICANT	TU	19 FOREST DR , BEDROCK, TX 75214	04-02-2015

Employment Comparison

COMPANY	POSITION	REPORTED
NO EMPLOYERS DEVELOPED		

Credit Bureau Report

Credit History

CREDITOR	OPENING DATE MONTHS REVIEWED	REPORTED DATE DLA	HIGH CREDIT	BALANCE	PAST DUE AMOUNT	HISTORICAL TIMES PAST DUE 30 60 90+	TYPE TERMS	PRESENT STATUS	ECOA
NO TRADELINES DEVELOPED									

ECOA KEY: B = BORROWER; C = CO-BORROWER; S = SHARED; J = JOINT; U = UNDESIGNATED; A = AUTHORIZED USER

Public Records

NO PUBLIC RECORDS DEVELOPED

Prior Inquiries

CREDITOR	INQUIRY TYPE	DATE	SRC	KIND OF BUSINESS	ECOA
NO PRIOR INQUIRIES DEVELOPED					

Repository Remarks

TU High Risk Fraud Alert;Available and Clear (H01)
TU A SUMMARY OF YOUR RIGHTS UNDER THE FAIR CREDIT REPORTING ACT

PARA INFORMACION EN ESPANOL, VISITE WWW.CONSUMERFINANCE.GOV/LEARNMORE O ESCRIBE A LA CONSUMER FINANCIAL PROTECTION BUREAU, 1700 G STREET N.W., WASHINGTON,DC 20006.

THE FEDERAL FAIR CREDIT REPORTING ACT (FCRA) PROMOTES THE ACCURACY, FAIRNESS, AND PRIVACY OF INFORMATION IN THE FILES OF CONSUMER REPORTING AGENCIES. THERE ARE MANY TYPES OF CONSUMER REPORTING AGENCIES, INCLUDING CREDIT BUREAUS AND SPECIALTY AGENCIES (SUCH AS AGENCIES THAT SELL INFORMATION ABOUT CHECK WRITING HISTORIES, MEDICAL RECORDS, AND RENTAL HISTORY RECORDS). HERE IS A SUMMARY OF YOUR MAJOR RIGHTS UNDER THE FCRA. FOR MORE INFORMATION, INCLUDING INFORMATION ABOUT ADDITIONAL RIGHTS, GO TO WWW.CONSUMERFINANCE.GOV/LEARNMORE, OR WRITE TO: CONSUMER FINANCIAL PROTECTION BUREAU, 1700 G STREET N.W., WASHINGTON, DC 20006.

- YOU MUST BE TOLD IF INFORMATION IN YOUR FILE HAS BEEN USED AGAINST YOU. ANYONE WHO USES A CREDIT REPORT OR ANOTHER TYPE OF CONSUMER REPORT TO DENY YOUR APPLICATION FOR CREDIT, INSURANCE, OR EMPLOYMENT - OR TO TAKE ANOTHER ADVERSE ACTION AGAINST YOU - MUST TELL YOU, AND MUST GIVE YOU THE NAME, ADDRESS, AND PHONE NUMBER OF THE AGENCY THAT PROVIDED THE INFORMATION.

- YOU HAVE THE RIGHT TO KNOW WHAT IS IN YOUR FILE. YOU MAY REQUEST AND OBTAIN ALL THE INFORMATION ABOUT YOU IN THE FILES OF A CONSUMER REPORTING AGENCY (YOUR "FILE DISCLOSURE"). YOU WILL BE REQUIRED TO PROVIDE PROPER IDENTIFICATION, WHICH MAY INCLUDE YOUR SOCIAL SECURITY NUMBER. IN MANY CASES, THE DISCLOSURE WILL BE FREE. YOU ARE ENTITLED TO A FREE FILE DISCLOSURE IF:

  - A PERSON HAS TAKEN ADVERSE ACTION AGAINST YOU BECAUSE OF INFORMATION IN YOUR CREDIT REPORT;

  - YOU ARE THE VICTIM OF IDENTITY THEFT AND PLACE A FRAUD ALERT IN YOUR FILE;

  - YOUR FILE CONTAINS INACCURATE INFORMATION AS A RESULT OF FRAUD;

  - YOU ARE ON PUBLIC ASSISTANCE;

  - YOU ARE UNEMPLOYED BUT EXPECT TO APPLY FOR EMPLOYMENT WITHIN 60 DAYS.

  IN ADDITION, ALL CONSUMERS ARE ENTITLED TO ONE FREE DISCLOSURE EVERY 12 MONTHS UPON REQUEST FROM EACH NATIONWIDE CREDIT BUREAU AND FROM NATIONWIDE SPECIALTY CONSUMER REPORTING AGENCIES. SEE WWW.CONSUMERFINANCE.GOV/LEARNMORE FOR MORE INFORMATION.

- YOU HAVE THE RIGHT TO ASK FOR A CREDIT SCORE. CREDIT SCORES ARE NUMERICAL SUMMARIES OF YOUR CREDIT-WORTHINESS BASED ON INFORMATION FROM CREDIT BUREAUS. YOU MAY REQUEST A CREDIT SCORE FROM CONSUMER REPORTING AGENCIES THAT CREATE SCORES OR DISTRIBUTE SCORES USED IN RESIDENTIAL REAL PROPERTY LOANS, BUT YOU WILL HAVE TO PAY FOR IT. IN SOME MORTGAGE TRANSACTIONS, YOU WILL RECEIVE CREDIT SCORE INFORMATION FOR FREE FROM THE MORTGAGE LENDER.

- YOU HAVE THE RIGHT TO DISPUTE INCOMPLETE OR INACCURATE INFORMATION. IF YOU IDENTIFY INFORMATION IN YOUR FILE THAT IS INCOMPLETE OR INACCURATE, AND REPORT IT TO THE CONSUMER REPORTING AGENCY, THE AGENCY MUST INVESTIGATE UNLESS YOUR DISPUTE IS FRIVOLOUS. SEE WWW.CONSUMERFINANCE.GOV/LEARNMORE FOR AN EXPLANATION OF DISPUTE PROCEDURES.

- CONSUMER REPORTING AGENCIES MUST CORRECT OR DELETE INACCURATE, INCOMPLETE, OR UNVERIFIABLE INFORMATION. INACCURATE, INCOMPLETE, OR UNVERIFIABLE INFORMATION MUST BE REMOVED OR CORRECTED, USUALLY WITHIN 30 DAYS. HOWEVER A CONSUMER REPORTING AGENCY MAY CONTINUE TO REPORT INFORMATION IT HAS VERIFIED AS ACCURATE.

- CONSUMER REPORTING AGENCIES MAY NOT REPORT OUTDATED NEGATIVE INFORMATION. IN MOST CASES, A CONSUMER REPORTING AGENCY MAY NOT REPORT NEGATIVE INFORMATION THAT IS MORE THAN SEVEN YEARS OLD, OR BANKRUPTCIES THAT ARE MORE THAN 10 YEARS OLD.

- ACCESS TO YOUR FILE IS LIMITED. A CONSUMER REPORTING AGENCY MAY PROVIDE INFORMATION ABOUT YOU ONLY TO PEOPLE WITH A VALID NEED - USUALLY TO CONSIDER AN APPLICATION WITH A CREDITOR, INSURER, EMPLOYER, LANDLORD, OR OTHER BUSINESS. THE FCRA SPECIFIES THOSE WITH A VALID NEED FOR ACCESS.

- YOU MUST GIVE YOUR CONSENT FOR REPORTS TO BE PROVIDED TO EMPLOYERS. A CONSUMER REPORTING AGENCY MAY NOT GIVE OUT INFORMATION ABOUT YOU TO YOUR EMPLOYER, OR A POTENTIAL EMPLOYER, WITHOUT YOUR WRITTEN CONSENT GIVEN TO THE EMPLOYER. WRITTEN CONSENT GENERALLY IS NOT REQUIRED IN THE TRUCKING INDUSTRY. FOR MORE INFORMATION, GO TO WWW.CONSUMERFINANCE.GOV/LEARNMORE.

- YOU MAY LIMIT "PRESCREENED" OFFERS OF CREDIT AND INSURANCE YOU GET BASED ON INFORMATION IN YOUR CREDIT REPORT. UNSOLICITED "PRESCREENED" OFFERS FOR CREDIT AND INSURANCE MUST INCLUDE A TOLL-FREE PHONE NUMBER YOU CAN CALL IF YOU CHOOSE TO REMOVE YOUR NAME AND ADDRESS FROM THE LISTS THESE OFFERS ARE BASED ON. YOU MAY OPT-OUT WITH THE NATIONWIDE CREDIT BUREAUS AT 1-888-567-8688 (888-5OPTOUT).

- YOU MAY SEEK DAMAGES FROM VIOLATORS. IF A CONSUMER REPORTING AGENCY, OR, IN SOME CASES, A USER OF CONSUMER REPORTS OR A FURNISHER OF INFORMATION TO A CONSUMER REPORTING AGENCY VIOLATES THE FCRA, YOU MAY BE ABLE TO SUE IN STATE OR FEDERAL COURT.

- IDENTITY THEFT VICTIMS AND ACTIVE DUTY MILITARY PERSONNEL HAVE ADDITIONAL RIGHTS. FOR MORE INFORMATION, VISIT WWW.CONSUMERFINANCE.GOV/LEARNMORE.

STATES MAY ENFORCE THE FCRA, AND MANY STATES HAVE THEIR OWN CONSUMER REPORTING LAWS. IN SOME CASES, YOU MAY HAVE MORE RIGHTS UNDER STATE LAW. FOR MORE INFORMATION, CONTACT YOUR STATE OR LOCAL CONSUMER PROTECTION AGENCY OR YOUR STATE ATTORNEY GENERAL. FOR INFORMATION ABOUT YOUR FEDERAL RIGHTS, CONTACT:

TYPE OF BUSINESS:	CONTACT:
1.a. BANKS, SAVINGS ASSOCIATIONS, AND CREDIT UNIONS WITH TOTAL ASSETS OF OVER $10 BILLION AND THEIR AFFILIATES	BUREAU OF CONSUMER FINANCIAL PROTECTION 1700 G STREET NW WASHINGTON, DC 20006
b. SUCH AFFILIATES THAT ARE NOT BANKS, SAVINGS ASSOCIATIONS, OR CREDIT UNIONS ALSO SHOULD LIST, IN ADDITION TO THE BUREAU:	FEDERAL TRADE COMMISSION CONSUMER RESPONSE CENTER -FCRA WASHINGTON, DC 20580 1-877-382-4357
2. TO THE EXTENT NOT INCLUDED IN ITEM 1 ABOVE: a. NATIONAL BANKS, FEDERAL SAVINGS ASSOCIATIONS, AND FEDERAL BRANCHES AND FEDERAL AGENCIES OF FOREIGN BANKS	OFFICE OF THE COMPTROLLER OF THE CURRENCY CUSTOMER ASSISTANCE GROUP 1301 McKINNEY STREET, SUITE 3450 HOUSTON, TX 77010-9050 1-800-613-6743
b. STATE MEMBER BANKS, BRANCHES AND AGENCIES OF FOREIGN BANKS (OTHER THAN FEDERAL BRANCHES, FEDERAL AGENCIES AND INSURED STATE BRANCHES OF FOREIGN BANKS), COMMERCIAL LENDING COMPANIES OWNED OR CONTROLLED BY FOREIGN BANKS, AND ORGANIZATIONS OPERATING UNDER SECTION 25 OR 25A OF THE FEDERAL RESERVE ACT	FEDERAL RESERVE CONSUMER HELP (FRCH) PO BOX 1200 MINNEAPOLIS, MN 55480 1-888-851-1920 WEBSITE ADDRESS: WWW.FEDERALRESERVECONSUMERHELP.GOV EMAIL ADDRESS: CONSUMERHELP@FEDERALRESERVE.GOV
c. NONMEMBER INSURED BANKS, INSURED STATE BRANCHES OF FOREIGN BANKS, AND INSURED STATE SAVINGS ASSOCIATIONS	FDIC CONSUMER RESPONSE CENTER 1100 WALNUT STREET BOX #11 KANSAS CITY, MO 64106
d. FEDERAL CREDIT UNIONS	NATIONAL CREDIT UNION ADMINISTRATION OFFICE OF CONSUMER PROTECTION (OCP) DIVISION OF CONSUMER COMPLIANCE AND OUTREACH (DCCO) 1775 DUKE STREET ALEXANDRIA, VA 22314 1-703-519-4600
3. AIR CARRIERS	ASST. GENERAL COUNSEL FOR AVIATION ENFORCEMENT & PROCEEDINGS DEPARTMENT OF TRANSPORTATION 400 SEVENTH STREET SW WASHINGTON, DC 20590 1-202-366-1306

4. CREDITORS SUBJECT TO SURFACE TRANSPORTATION BOARD	OFFICE OF PROCEEDINGS, SURFACE TRANSPORTATION BOARD DEPARTMENT OF TRANSPORTATION 1925 K STREET NW WASHINGTON, DC 20423
5. CREDITORS SUBJECT TO PACKERS AND STOCKYARDS ACT	NEAREST PACKERS AND STOCKYARDS ADMINISTRATION AREA SUPERVISOR
6. SMALL BUSINESS INVESTMENT COMPANIES	ASSOCIATE DEPUTY ADMINISTRATOR FOR CAPITAL ACCESS UNITED STATES SMALL BUSINESS ADMINISTRATION 406 THIRD STREET, SW, 8TH FLOOR WASHINGTON, DC 20416
7. BROKERS AND DEALERS	SECURITIES AND EXCHANGE COMMISSION 100 F ST NE WASHINGTON, DC 20549
8. FEDERAL LAND BANKS, FEDERAL LAND BANK ASSOCIATIONS, FEDERAL INTERMEDIATE CREDIT BANKS, AND PRODUCTION CREDIT ASSOCIATIONS	FARM CREDIT ADMINISTRATION 1501 FARM CREDIT DRIVE McLEAN, VA 22102-5090
9. RETAILERS, FINANCE COMPANIES, AND ALL OTHER CREDITORS NOT LISTED ABOVE	FTC REGIONAL OFFICE FOR REGION IN WHICH THE CREDITOR OPERATES OR FEDERAL TRADE COMMISSION: CONSUMER RESPONSE CENTER- FCRA WASHINGTON, DC 20580 1-877-382-4357

Source Information

Creditors

CREDITOR	SUB CODE	ADDRESS	PHONE
NO CREDITORS DEVELOPED			

Submission Results

APPLICANT	BUREAU	DATE	RESULT
APPLICANT	TRANSUNION	04-02-2015 02:39:39 PM	NO RECORD FOUND

Repository Referral

TransUnion Consumer Relations
www.transunion.com/myoptions
2 Baldwin Place
P.O. Box 1000
Chester, PA 19022
800-888-4213

Comments

***** End of Credit Report *****

Investigative

County Criminal Records Search

RESULTS	**Records Found**		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:50 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	10 years
JURISDICTION	TX-HIDALGO		

***** Abstract *****

NAME ON RECORD	JANET L TESTCASE	CASE NUMBER	CR- 1234565656
DOB ON RECORD	10/05/1962	COURT	DISTRICT
OTHER IDENTIFIERS		FILE DATE	03/04/2010
OTHER INFO			

Count-1

TYPE	MISD CLASS B	OFFENSE	DRIVING WHILE INTOXICATED
DISPOSITION	CONVICTED		
DISPOSITION DATE	10/01/2010	OFFENSE DATE	03/04/2010
SENTENCE	18 MOS PROBATION/ $1000.00 FINE		
OTHER INFO	PROBATION EXPIRED: 04/06/2012		
COMMENT			

WARNING: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'Records Found' means that our researchers found a record(s) in that jurisdiction that matched the personal identifiers (i.e., Name, SSN, Date of Birth, Address) listed for the subject in the above abstract. First Check does not guarantee the accuracy or truthfulness of

the information as to the subject of the investigation, but only that it is accurately copied from public records. Information generated as a result of identity theft, including evidence of criminal activity, may be inaccurately associated with the consumer who is the subject of this report. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

COUNTY WANTS AND WARRANT

NO REPORTABLE RECORDS FOUND - DALLAS COUNTY
JANET TESTCASE

State Criminal Records Search

RESULTS	**No Reportable Records Found**		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:46 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	10 years
JURISDICTION	TEXAS		

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'No Reportable Records Found' means that our researchers could not locate a record that matched at least two personal identifiers (i.e., Name, SSN, Date of Birth, Address) for the subject in that jurisdiction. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

Federal Criminal Records Search

RESULTS	**No Reportable Records Found**		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:47 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	10 years
JURISDICTION	TEXAS NORTHERN		

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'No Reportable Records Found' means that our researchers could not locate a record that matched at least two personal identifiers (i.e., Name, SSN, Date of Birth, Address) for the subject in that jurisdiction. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

InstaCriminal National Search

RESULTS	**No Reportable Records Found**		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:30 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	
JURISDICTION	NATIONWIDE		

JURISDICTION(S) SEARCHED

The search you have selected is a search of our criminal database(s) and may not represent 100% coverage of all criminal records in all jurisdictions and/or sources. Coverage details available upon request.

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'No Reportable Records Found' means that our researchers could not locate a record that matched at least two personal identifiers (i.e., Name, SSN, Date of Birth, Address) for the subject in that jurisdiction. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

Global Homeland Security Search

RESULTS	**No Reportable Records Found**		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:30 PM MDT

SOURCES

Alabama Medicaid - Suspended Providers, America's Most Wanted Fugitive List, Australia Sex Offender Registry, Australian Dept of Foreign Affairs and Trade - Sanctions List, Australian Reserve Bank Sanctions List, Bank of England Sanctions List, California Medi-Cal - Suspended and Ineligible Providers, Connecticut Dept of Social Services - Admin Actions List, DEA Diversion Control Program - Admin Actions against Doctors, DEA Diversion Control Program - Cases against Doctors, Delaware Adult Abuse Registry, Directorate of Defense Trade Controls - Debarred Parties List, European Union Terrorism Sanctions List, FDA Office of Regulatory Affairs - Debarment List, FDA Office of Regulatory Affairs - Warning Letters, Federal Deposit Insurance Corporation (FDIC) - Failed Bank List, Federal Deposit Insurance Corporation (FDIC) - Enforcement Decisions and Orders, Federal Reserve Board - Enforcement Actions, FinCEN - Enforcement Actions, FINRA - Disciplinary Actions, Florida Medicaid - Sanctioned Providers, Fugitive List, Health Resources and Services Administration - Health Education Assistance Loan - Defaulted Borrowers, HM Treasury - Consolidated List of Financial Sanctions, HM Treasury - Investment Ban List, Hong Kong Securities and Futures Commission (SFC) - Enforcement Actions, HUD - Limited Denials of Participation List, Idaho Medicaid Provider - Exclusion List, Illinois Casino Exclusion List, Illinois Office of Inspector General - Sanctioned Providers, Immigration and Customs Enforcement (ICE) - Most Wanted, Interpol Most Wanted, Japan Ministry of Economy, Trade, and Industry (METI) - End User List, Kansas Dept of Health and Environment - Abuse Registry, Kentucky Medicaid - Excluded Providers, Maryland Medicaid - Exclusion List, MIPT Terrorism Knowledge Base, Mississippi Medicaid - Excluded Providers, Missouri Casino Exclusion List, Monetary Authority of Singapore - Enforcement Actions, National Credit Union Administration (NCUA) - Administrative Orders, Naval Criminal Investigative Service (NCIS) - Most Wanted Fugitives, Nevada Gaming Control Board - Excluded Person List, New Jersey Casino Exclusion List, New Jersey Dept of Treasury - Debarment List, New York Office of the Medicaid Inspector General - Exclusion List, New York Stock Exchange Regulation - Disciplinary Actions, Office of Foreign Assets Control (OFAC) - Specially Designated Nationals List, Office of Inspector General (OIG) - Health and Human Services Exclusion List, Office of Inspector General (OIG) - Most Wanted Health Care Fugitives, Office of Regulatory Affairs - Disqualified, Restricted and Assurances List for Clinical Investigators, Office of Research Integrity - Public Health Service - Administrative Actions List, Office of the Comptroller of Currency (OCC) - Enforcement Actions List, Office of the Superintendent of Financial Institutions (OSFI) - Canadian Sanctions List, Office of Thrift Supervision (OTS) - Enforcement Actions List, Ohio

Medicaid - Sanctioned Providers, Ohio Medicaid - Suspended Providers, Palestinian Legislative Council List, Pennsylvania Medicheck - Precluded Providers List, Politically Exposed Persons List, SEC - Enforcement Actions, South Carolina Medicaid - Excluded Providers, Tennessee Dept of Health - Abuse Registry, Texas Employee Misconduct Registry, Texas Health and Human Services Commission Medicaid and Title XX Provider Exclusion List, TRICARE Sanctions List, UK Disqualified Directors List, United Nations Consolidated Sanctions List, US Commodity Futures Trading Commission (CFTC) - Disciplinary Actions, US Dept of Commerce - Denied Persons, Unverified, and Entity List, US Dept of Labor - Forced and Child Labor List, US Dept of State - Foreign Terrorist Organizations List, US Dept of State - Nonproliferation Sanctions, US Dept of State - Terrorist Exclusion List, US Dept of Treasury - Primary Money Laundering Concern List, US General Services Administration (GSA) - Excluded Parties List, World Bank Listing of Ineligible Individuals

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by applicable laws. 'No Reportable Records Found' means that our researchers could not locate a record that matched. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

Sex Offender Records Search

RESULTS	**No Reportable Records Found**		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:47 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	
JURISDICTION	TEXAS		

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by applicable laws. 'No Reportable Records Found' means that our researchers could not locate a record that matched. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

County Civil Records Search

RESULTS	**Records Found**		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:42 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	7 years
JURISDICTION	MO-OSAGE		

***** Abstract *****

PLAINTIFF	JANET TESTCASE	CASE NUMBER	CV556566
DEFENDANT	CITY OF ROCKY ROAD	COURT NAME	COUNTY CT 456
FILE DATE	07/15/2011	JURISDICTION	
PLAINTIFF ATTORNEY	MARK A FISHER	CASE TYPE	CIVIL - HARASSMENT
DISPOSITION DATE	06/12/2012	DISPOSITION	JUDGMENT
COMMENT			

WARNING: Based on the information provided First Check searched for public records in the sources referenced herein for civil history information as permitted by federal and state law. 'Records Found' means that our researchers found a record(s) in that jurisdiction that matched the personal identifiers (i.e., Name, SSN, Date of Birth, Address) listed for the subject in the above abstract. First Check does not guarantee the accuracy or truthfulness of the information as to the subject of the investigation, but only that it is accurately copied from public records. Information generated as a result of identity theft, including evidence of civil activity, may be inaccurately associated with the consumer who is the subject of this report. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

Credentials

Education Verification

RESPONSE RECEIVED	**Yes**		
INSTITUTION NAME	**UNIVERSITY OF SYRACUSE**	SEARCH DATE	04-02-2015 1:51 PM MDT
CITY, STATE	SYRACUSE, NY	CONTACT	WRITTEN/ SC
INSTITUTION PHONE	N/A	SUBJECT	JANET TESTCASE
INSTITUTION FAX			
INSTITUTION EMAIL			

	SUBJECT-PROVIDED INFORMATION	INSTITUTION-PROVIDED INFORMATION
SOCIAL SECURITY		123-45-6789
DATES CLAIMED	MAY 2013	DATE AWARDED: 05/15/2013
DEGREE(S) CLAIMED	MASTERS OF PUBLIC ADMIN	MASTERS PUBLIC ADMIN
MAJOR(S) CLAIMED	PUBLIC ADMINISTRATION	PUBLIC ADMINISTRATION
GPA CLAIMED		
HONORS CLAIMED		
ATTENDING NAME		
COMMENTS		

Instant Driving Records

RESULTS	**License Found**

STATE OF ISSUE Texas
LICENSE NUMBER 09555186
SEARCH DATE 04-02-2015 1:37 PM MDT

License Number:	01234567
License State:	TX
Full Name:	TESTCASE, JANET
DOB:	1962-10-05
Address:	19 FOREST DRIVE BEDROCK, TX 79501

License Info

Status:	CLEAR
Class:	C
Class Description:	Non-Comm. C - Single or comb veh , not in class A or B
Expiration Date:	2018-10-05
Original Issue Date:	1978-03-16

Other License Info

Report Message:	NO ENTRIES FOUND FOR THIS PERSON
MVR Status:	MVR found
MVR History Length:	3
MVR Score:	A valid driver license (active, clear, eligible, valid, etc) with at least 3 years of history and a clear MVR. (0)

Messages

```
Alert: Requested last name(TESTCASE) did not match.
Commercial Driver License (CDL) Indicator: N
THIS TYPE OF RECORD WILL NOT REFLECT COMPLETION OF A DRIVING SAFETY COURSE.
THIS RECORD REFLECTS CONVICTIONS AND CRASH INVOLVEMENTS THAT ARE ALLOWED TO BE
DISPLAYED BY LAW.
```

WARNING: Confidential Information - To Be Used As Per State And Federal Laws. Misuse May Result In A Criminal Prosecution.

COMPREHENSIVE REPORT

Subject Information: **(Best Information for Subject)**

Name: JANET L TESTCASE DOB:10/05/1962

SSN: 123-45-xxxx issued in TEXAS between *01/01/1975* and *12/31/1976*

Age: 31

Names Associated With Subject:

JANET L TESTCASE LexID: 8071868866 DOB: 1962

JANET TESTCASE LexID: 8071868866 DOB: 10/05/1962
123-45-xxxx issued in TX

Others Associated With Subjects SSN:

(DOES NOT usually indicate any type of fraud or deception)

[None Found]

Comprehensive Report Summary:

Names Associated With Subject:
2 Found
Others Associated With Subjects SSN:
None Found
Address Summary:
2 Found
Active Address(es):
1 Found
Previous & Non-Verified Addr:
1 Found
Possible Criminal Records:
None Found
Sexual Offenses:
None Found
Driver's License:
1 Found
Motor Vehicles Registered:
1 Found
Concealed Weapons Permit:
None Found
DEA Controlled Substances:
None Found
Professional Licenses:
None Found
Watercraft:
None Found
Bankruptcies:
None Found
Liens and Judgments:
None Found
UCC Filings:
None Found
Possible Properties Owned:
1 Found
Possible Associates:
None Found

Address Summary:

19 FOREST DR , BEDROCK, TX 77469-1826, HIDALGO COUNTY (1995- Jan 2015)
12924 PECOS RD, KNOXVILLE TX 37934-0885, KNOX COUNTY (Feb 2002 - Jan 2015)
7404 TOWN CENTER BLVD APT 808, ROSENBERG TX 77471-6232, FORT BEND COUNTY (Apr 2011 - May 2014)
Utility Locator - Connect Date: 4/28/2011
✔21027 JAMES LONG CT, RICHMOND TX 77406-6453, FORT BEND COUNTY (Jun 2007 - Oct 2013)
1611 LAUREL AVE APT 303, KNOXVILLE TN 37916-2078, KNOX COUNTY (Oct 2005)
135 WHITE DR APT -2, TALLAHASSEE FL 32304-3090, LEON COUNTY (May 2004 - Jun 2004)
1505 W THARPE ST APT 3632, TALLAHASSEE FL 32303-4575, LEON COUNTY (Sep 2002 - Jan 2004)

Active Address(es):

✔19 FOREST HILL DR, BEDROCK, TX 77406-6453, HIDALGO COUNTY

Name Associated with Address:
JANET TESTCASE
Current Residents at Address:
DAVID TESTCASE

Property Ownership Information for this Address
Property:
Parcel Number - 5121-06-001-0320-901
Owner Name: DAVID WTESTCASE LexID: 2561089892
Owner Name 2: JANET TESTCASE LexID: 2561096692
Property Address: - 19 FOREST HILL, BEDROCK TX 77406-6453, HILDAGO COUNTY
Owner Address: 21027 JAMES LONG CT, RICHMOND TX 77406-6453, FORT BEND COUNTY
Sale Date - 05/29/1995
Sale Price - $325,850
Subdivision Name - LONG MEADOW
Total Market Value - $467,230
Assessed Value - $443,810
Land Value - $89,250
Improvement Value - $377,980

Land Size - 13,299 Square Feet
Year Built - 2006
Seller Name: HOUSTON VILLAGE BUILDERS INC
Legal Description - LONG MEADOW FARMS SEC 6, BLOCK 1, LOT 32
Loan Amount - $245,000
Lender Name - CITIMORTGAGE
Data Source - A

Previous And Non-Verified Address(es):

1118 MESSINA LN, RICHMOND TX 77469-1826, FORT BEND COUNTY (2014 - Jan 2015)

Name Associated with Address:

DAVID TESTCASE

Current Residents at Address:

STEVEN FRYER

Property Ownership Information for this Address

Property:

Parcel Number - 6469-03-002-0010-901
Owner Name: STEVEN FRYER LexID: 8071868866
Property Address - 1118 MESSINA LN, RICHMOND TX 77469-1826, FORT BEND COUNTY
Owner Address: 1118 MESSINA LN, RICHMOND TX 77469-1826, FORT BEND COUNTY
Sale Date - 04/15/2014
Seller Name: PULTE HOME OF TEXAS LP
Loan Amount - $149,168
Loan Type - NEW CONVENTIONAL
Data Source - B

1

Possible Criminal Records:

[None Found]

Sexual Offenses:

[None Found]

Driver's License Information:

Name: JANET L TESTCASE
LexID: 80718688
DL Number: xxxxxxxx
State: Texas
License Address: 19 FOREST DR, BEDROCK TX 77469-1826, FORT BEND COUNTY
DOB: 10/05/1962
Potential SSN : 123-45-xxxx
Issue Date: 05/09/2014
Data Source: Governmental

Motor Vehicles Registered To Subject:

Vehicle:

Description: Gray Silver 2006 Toyota Camry - Sedan 4 Door
VIN: 4T1BE30K26U67
State Of Origin: TEXAS
Engine: 4 Cylinder 144 Cubic Inch
Anti Lock Brakes: 4 wheel standard
Air Conditioning: Standard
Daytime Running Lights: Standard
Power Steering: Standard
Power Brakes: Standard
Power Windows: Standard
Security System: Immobilizer and Alarm
Roof: None / not available
Price: 20375
Radio: AM/FM CD
Front Wheel Drive: Yes
Four Wheel Drive: No
Tilt Wheel: Unknown
Data Source: Governmental

Registrant(s)

Record Type: CURRENT
Name: JANET L TESTCASE
LexID: 8071868866
Potential SSN : 123-45-xxxx
Address: 19 FOREST HILL, BEDROCK TX 77469-1826, FORT BEND COUNTY
DOB: 10/05/1962
Sex: FEMALE

Tag Number: BD9B1
License State: TX
Earliest Registration Date: 10/1/2014
Latest Registration Date: 10/1/2014
Expiration Date: 9/30/2015
License Plate Type: Private

Concealed Weapons Permit:

[None Found]

DEA Controlled Substances:

[None Found]

Professional License(s):

[None Found]

Watercraft:

[None Found]

Bankruptcies:

[None Found]

Liens and Judgments:

[None Found]

UCC Filings:

[None Found]

Possible Properties Owned by Subject:

Property:

Parcel Number - 6469-03-002-0010-901
Owner Name: JANET L TESTCASE LexID: 8071868866
Property Address - 19 FOREST DR, BEDROCK TX 77469-1826, HIDALGO COUNTY

Sale Date - 04/15/2014
Seller Name: PULTE HOME OF TEXAS LP
Loan Amount - $149,168
Loan Type - NEW CONVENTIONAL
Data Source - B

Possible Associates:

NONE FOUND

Disclaimer

This report is furnished to you pursuant to the Agreement for Service between the parties and in compliance with the Fair Credit Reporting Act. This report is furnished based upon your certification that you have a permissible purpose to obtain the report. The information contained herein was obtained in good faith from sources deemed reliable, but the completeness or accuracy is not guaranteed.

***** End Of Report *****

TAB 14

(Attached as separate file)

MANAGEMENT PROFILE

EVERYTHING DiSC MANAGEMENT

ASSESSMENT TO ACTION.

Casey Tyler

Thursday, June 12, 2014

This report is provided by:

Strategic Government Resources, Inc.
Ron Holifield
PO Box 1642
Keller, TX 76244
817-337-8581
www.GovernmentResource.com

SGR

WILEY

INTRODUCTION TO DiSC®

Welcome to Everything DiSC®

Casey, have you ever wondered why connecting with some people is easier for you than with others?

Maybe you've noticed that you have an easier time managing people who focus on creating lively environments and relationships.

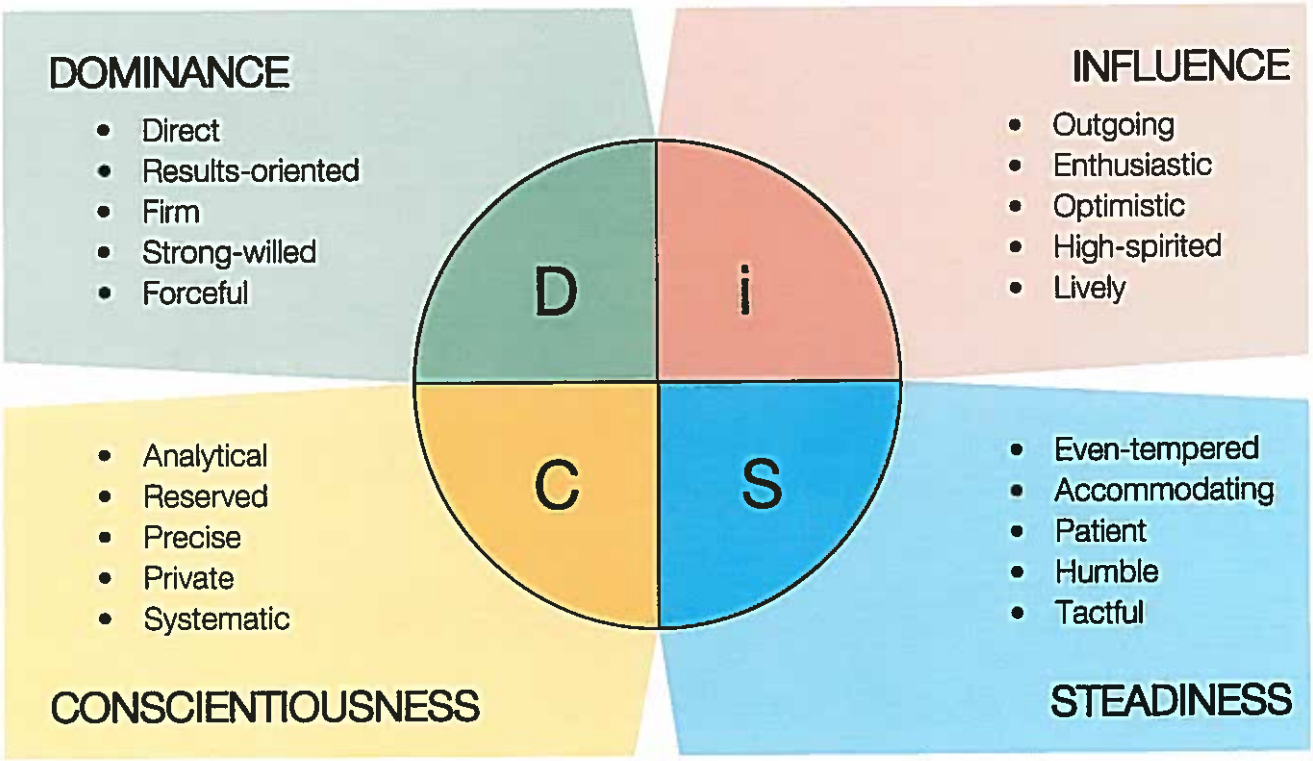
Or, maybe you're more comfortable working with those who take an optimistic, fast-paced approach than those who work at a steadier pace.

Or, perhaps you relate best to people who are more enthusiastic than analytical.

Everything DiSC® is a simple tool that offers information to help you understand yourself and others better—and this can be of tremendous use as a manager. This report uses your individual assessment data to provide a wealth of information about your management priorities and preferences. In addition, you'll learn how to connect better with people whose priorities and preferences differ from yours.

Cornerstone Principles

- All DiSC style are **equally valuable**, and people with all styles can be effective managers.
- Your management style is also influenced by **other factors** such as life experiences, education, and maturity.
- **Understanding yourself** better is the first step to becoming more effective with your employees and your manager.
- Learning about other people's DiSC styles can help you **understand their priorities** and how they may differ from your own.
- You can improve the quality of your management experience by using DiSC to build more **effective relationships.**



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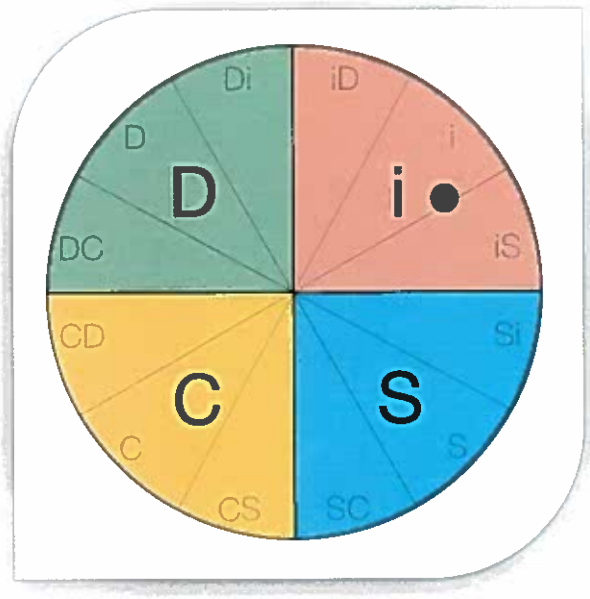
YOUR DiSC® OVERVIEW

How is this report personalized to you, Casey?

In order to get the most out of your *Everything DiSC Management® Profile*, you'll need to understand your personal map.

Your Dot

As you saw on the previous page, the Everything DiSC® model is made up of four basic styles: D, i, S, and C. Each style is divided into three regions. The picture to the right illustrates the 12 different regions where a person's dot might be located.



Your DiSC® Style: i

Your dot location indicates your DiSC style. Because your dot is located in the middle of the i region, you have an i style.

Keep in mind that everyone is a blend of all four styles, but most people tend strongly toward one or two styles. Whether your dot is in the center of one style or in a region that borders two, **no dot location is better than another.** All DiSC® styles are equal and valuable in their own ways.

Close to the Edge or Close to the Center?

A dot's **distance from the edge** of the circle shows how naturally inclined a person is to encompass the characteristics of his or her DiSC style. A dot positioned toward the edge of the circle indicates a strong inclination toward the characteristics of the style. A dot located between the edge and the center of the circle indicates a moderate inclination. And a dot positioned close to the center of the circle indicates a slight inclination. A dot in the center of the circle is no better than one on the edge, and vice versa. Your dot location is near the edge of the circle, so you are **strongly inclined** and probably relate well to the characteristics associated with the i style.

Now that you know more about the personalization of your Everything DiSC Management Map, you'll read about the management priorities and preferences associated with the i style. Using this knowledge, you'll learn how to use Everything DiSC principles to improve your ability to direct, delegate, motivate, and develop others more successfully. Finally, you'll explore ways to work more effectively with your own manager.

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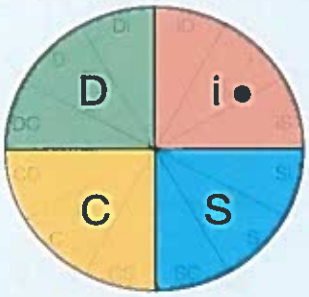
YOUR DiSC® STYLE & DOT

Your Dot Tells a Story

Your DiSC Style Is: i



Like other managers with the i style, Casey, you probably enjoy relating to other people. You tend to have a fairly extensive network of friends and colleagues, and you may view a roomful of strangers as a fun opportunity to connect. Similarly, you're likely to get personal satisfaction out of introducing people who would not otherwise meet.

Because you're optimistic and enthusiastic, you may find it easy to get the people you manage excited about your goals and ideas. When you speak, you're likely to promote your opinions with passion. Many people probably find your enthusiasm contagious. However, those who are more skeptical may feel that you are overly optimistic at times.

When communicating, you tend to be expressive, and you may dial up your volume and gestures to get people's attention. Compared to most managers, you have a stronger urge to process your feelings by verbalizing them. At times, your somewhat talkative nature may cause you to monopolize conversations, particularly with those who are more soft-spoken.

In terms of time management, you like to have a variety of tasks on your plate and probably grow bored with routine. Most likely, you maintain your enthusiasm and drive under time pressure. Although you're often excited to start a new project, you may sometimes dive in without adequate planning or resources. Because you're probably confident in your ability to improvise, you may prefer a more free-flowing approach.

You probably enjoy making gut-instinct decisions, but you also tend to be accepting of other people's ideas. In fact, when people offer opinions or weigh in, you sometimes may be reluctant to give negative feedback for fear of being seen as the "bad guy." At times, your optimism may also cause you to overestimate your own abilities or misjudge the difficulty of a task.

You genuinely enjoy being around other people, so you probably encourage people to work collaboratively. Most likely, you see team brainstorming sessions as leading to endless possibilities, and you tend to actively solicit ideas from other people. However, because you naturally want to connect and collaborate with others, you may not always realize that some people require more personal space.

Like others with the i style, you may tie your self-worth closely to your social circle. You strive to make favorable impressions whenever possible, and you're most likely comfortable being the center of attention. In fact, you probably enjoy telling stories and entertaining others in a colorful, engaging way.

In conflict, you may be inclined to brush any unpleasantness under the rug for as long as possible. However, if your anger, frustration, or hurt reaches a breaking point, you may say things you later regret. For you, venting may feel like a therapeutic process, but it may make the people you manage highly uncomfortable.

Casey, like others with the i style, your most valuable contributions as a manager may include your ability to generate excitement, your high energy, and your desire to bring people together. In fact, these are probably some of the qualities that others admire most about you.

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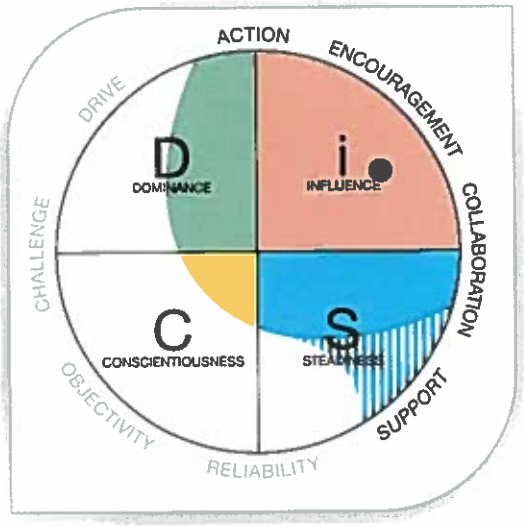
YOUR DiSC® PRIORITIES & SHADING

Your Shading Expands the Story

Casey, while your dot location and your DiSC® style can say a great deal about you, your map **shading** is also important.

The eight words around the Everything DiSC map are what we call **priorities,** or the primary areas where people focus their energy. The closer your shading comes to a priority, the more likely you are to focus your energy on that area. Everyone has at least three priorities, and sometimes people have four or five. **Having five priorities is no better than having three, and vice versa.**

Typically, people with the i style have shading that touches **Encouragement**, **Action**, and **Collaboration**. Your shading stretches to include **Support**, which isn't characteristic of your style.



What Priorities Shape *Your* Management Experience?

▶ **Providing Encouragement**
Casey, like other managers with the i style, you tend to value people's emotional needs and want members of your team to feel good about their contributions. Therefore, you probably take time to give people recognition and celebrate group victories. You focus on providing encouragement so people feel energized and optimistic about their work.

▶ **Valuing Collaboration**
You tend to recognize the importance of group effort, making it a key component of how you work. Most likely, you include others in important activities and decisions, and you may pride yourself on your ability to build team spirit by getting everyone involved. You value collaboration because you think it not only leads to better outcomes, but it makes the job more fun.

▶ **Taking Action**
Managers with the i style usually like excitement and fast movement. Most likely, you're energized by innovative, groundbreaking solutions, and you're eager to hit the ground running. In fact, your pace might be a bit fast for some of the people you manage, but rather than slow down, you may encourage them to catch up with you. Because you emphasize action, you may inspire your team to push forward quickly.

▶ **Giving Support**
Moreover, you place a high priority on supporting others, although this is not typical of the i style. You may prefer to have harmony in your relationships, and people probably know you're ready to help or listen patiently when needed. Because an orderly, peaceful environment is important to you, you're willing to put your own needs aside to give support to others.

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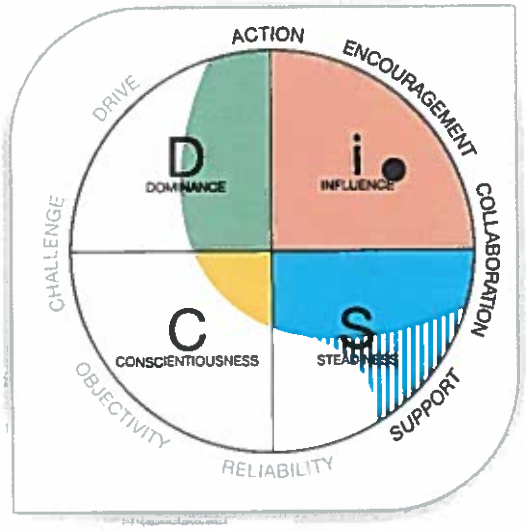
YOUR MANAGEMENT PREFERENCES

What Do You Enjoy About Managing?

Different people find different aspects of their work motivating. Like other people with the i style, you may enjoy working with others toward a common goal, and you may strive to create a high-energy environment where people can express themselves. In addition, you likely appreciate that management allows you to help others succeed in their professional development. Furthermore, you may appreciate the ability to foster a supportive environment where people listen to one another's needs, and this is less typical of the i style.



What do your priorities say about what motivates you and what you find stressful?

You probably enjoy many of the following aspects of your work:

MOTIVATORS

- Developing warm relationships with team members
- Keeping things moving
- Inspiring others to do their best
- Promoting creativity
- Building an optimistic mindset in others
- Getting people involved
- Increasing enthusiasm
- Supporting people when they express their concerns and frustrations
- Considering the needs and opinions of others

What Drains Your Energy as a Manager?

Then there are those management responsibilities that are stressful for you. Because you want to maintain friendly relationships and be well-liked, you may have problems pushing people to get results, especially if doing so requires you to confront them. Furthermore, you may dislike an atmosphere that feels dull or hinders your energetic pace. At the same time, unlike others with the i style, you may find it difficult to manage people who are too aggressive or combative.

Many of the following aspects of your work may be stressful for you:

STRESSORS

- Giving people unpleasant feedback
- Being forceful or insistent with others
- Making tough decisions independently
- Working steadily toward long-term goals
- Managing challenging or skeptical people
- Being unable to use your intuition
- Having to slow your pace
- Having to reprimand people
- Dealing with angry or argumentative people

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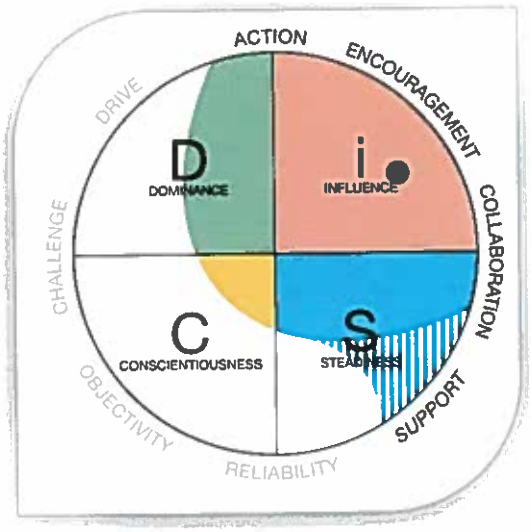
YOUR DIRECTING & DELEGATING STYLE

As a manager, you may find that effectively directing and delegating to your employees is more complex than simply handing off an assignment with a "please" and "thank you." Perhaps you've noticed that individual employees respond positively to different types of instruction and feedback. Some want specific directions and welcome objective feedback, while others want just the opposite. Based on your DiSC® style and priorities, you have a natural approach to directing and delegating. However, to maximize satisfaction and productivity, it's important to consider how effective your approach may be with employees of different styles.

Casey, because you place a **strong emphasis on encouragement**, you tend to be optimistic about people and their abilities. Therefore, you usually give individuals the benefit of the doubt and may assign tasks to team members without making sure they have the skills to get the job done.



You also prefer to **collaborate**, and the people you manage may be empowered by your trust in their abilities. However, when situations require a more direct approach, you may have trouble being tough and holding people accountable.

Because you **focus on action**, you tend to be fast-paced when directing a team. You probably try to get others excited about their tasks, but you may occasionally be vague about the specifics in your eagerness to get people moving.

Furthermore, you tend to be **supportive**, which isn't typical for someone with the i style. As such, you usually make sure people know you're there to help when needed.

How Do You Approach Directing & Delegating?

STRENGTHS	CHALLENGES
• Giving direction in a friendly and positive manner • Making people feel that they are important contributors • Encouraging creativity in the execution of tasks • Listening to people's concerns about assignments • Getting people moving • Making yourself available to help	• Pushing people to complete their tasks • Judging people's abilities or competencies, without overestimating them • Giving clear, detailed explanations • Analyzing options before assigning a task • Highlighting the importance of routine tasks • Creating a reliable setting

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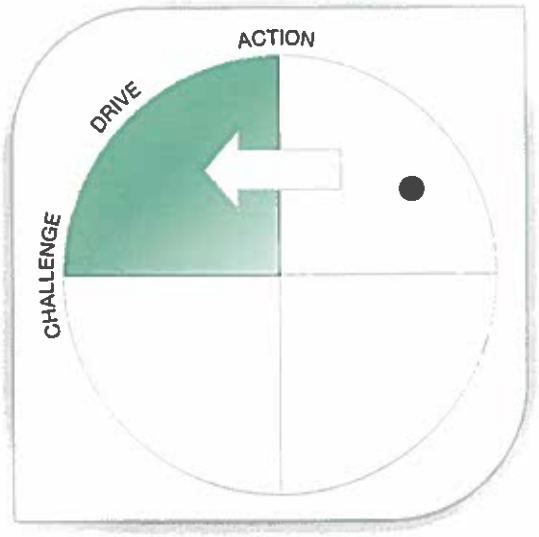
DIRECTING & DELEGATING TO THE D STYLE



How Does the D Style Like to Work?

People with the D style prioritize the bottom line and are driven to get results. Furthermore, they are willing to take risks in pursuit of success, probably even more so than you. They strive for ambitious goals and want the freedom to make their own decisions without having to ask for input from other people. And because they value their independence, they may not share your preference to collaborate and work closely as a team. Their autonomy also makes them less likely to require the encouragement you frequently offer.

Potential Problems When Working Together

People with the D style are often questioning and skeptical, and they may challenge your authority if they disagree with your decisions. They don't share your focus on other people's feelings and may be blunt or assertive when expressing their opinions. And because you tend to assume the best in people, you may mistake their self-assured attitude as competence, even if they don't have the necessary skills or experience. In these cases, you may be surprised when they fail to deliver what you expected.

How to Be Effective with the D Style

Like you, people with the D style are fast-paced and want to work on exciting projects that will make a big impact. Therefore, encourage them to tackle more adventurous tasks. Give them freedom to decide on methods and tactics, but make sure they don't try to make decisions that exceed their qualifications. If they have exhibited sound judgment in the past, show respect for their bold ideas and decision-making ability. Given your i style, you may need to focus more closely on their skill level and make sure to check in more frequently if they lack experience.

If they're less experienced:

- Don't confuse confidence with competence.
- Review their plans before they move ahead.
- Check in often enough to make sure they're on track.
- Have them check with you before any risky decisions are made.
- Let them know that they will be given more autonomy as they gain experience.

If they're more experienced:

- Show them the most practical way to be productive.
- Be direct about the results you expect.
- Set a deadline and let them figure out how to proceed.
- Make sure they understand the consequences of their shortcuts.
- Specify the limits of their authority while still allowing for some autonomy.

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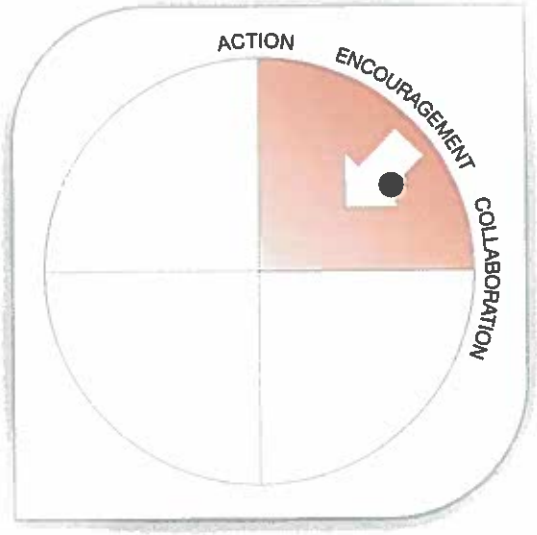
DIRECTING & DELEGATING TO THE i STYLE

How Does the i Style Like to Work?



People who share your i style are generally upbeat and optimistic. You're both usually sociable and openly expressive, and they probably appreciate your tendency to provide them with encouragement. They typically share your enthusiasm for exciting tasks and your eagerness to interact with others. Furthermore, they're outgoing when it comes to expressing their thoughts and feelings. Just as you tend to be at ease when ideas and conversation flow freely, they may be most relaxed when they can be upfront about their needs.

Potential Problems When Working Together

People who share your i style like to work in a fun environment, and you both probably appreciate the social aspects of the job. Like you, they enjoy spending time with other people, channeling their high energy into collaborative efforts. However, at times, your "i" employees may allow social needs to take precedence over the bottom line, and you may neglect to push them for practical results. And because you may find it easy to develop friendly relationships with them, it may be difficult for you to give them negative feedback.

How to Be Effective with the i Style

Like you, these individuals tend to move quickly. Because they seek new or exciting projects, they may become restless if they are forced to work for long periods of time on routine tasks. They share your tendency to improvise and make spontaneous decisions. As a result, you may need to check in frequently with those who lack experience to make sure they are on track and meeting deadlines. For those who are more experienced, encourage creativity and experimentation, but make sure vital details or tasks don't slip through the cracks.

If they're less experienced:

- Make sure they don't lose track of details.
- Give them plenty of encouragement.
- Limit their socializing.
- Check their understanding since their enthusiasm might hide a lack of clarity.
- Hold them accountable for missed deadlines or skipped steps.

If they're more experienced:

- Allow them to take the lead in group settings.
- Make time to go over the details with them.
- Encourage them to keep moving forward.
- Acknowledge their contributions publicly.
- Keep them on track and on schedule.

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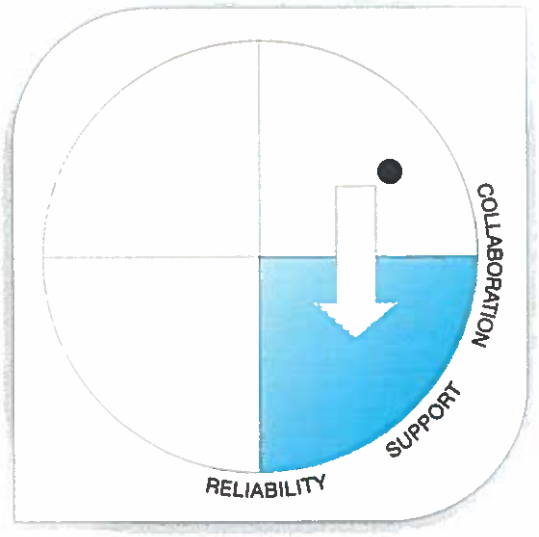
DIRECTING & DELEGATING TO THE S STYLE

How Does the S Style Like to Work?

People with the S style tend to be accommodating and flexible, and you share their supportive nature even though it's less typical for someone with the i style. Therefore, they'll respond positively to your friendly manner and genuine interest in their needs. However, because they want to be sure they know exactly what is required, they want to be given clear guidance, yet may be too soft-spoken to ask for it. Consequently, you may need to make an extra effort to supply the step-by-step instruction that they like.



Potential Problems When Working Together

These individuals tend to make steady progress toward predictable goals, while you're more likely to rely on the power of enthusiasm and big ideas. Therefore, they may become uncomfortable if you delegate high-pressure tasks to them or urge them to take risks. They dislike dealing with abrupt changes, so your tendency to improvise and make quick adjustments may leave them disoriented. As a result, they may look for more stability from you, while you may become frustrated with their hesitancy to take chances.

How to Be Effective with the S Style

Like you, people with the S style may be most comfortable in friendly, cooperative environments. While they share your preference to collaborate with others, they will seldom push for more authority within the group because they are much more comfortable working behind the scenes. Give them step-by-step instructions and make sure they're comfortable with a task before setting them loose. If they have more experience, give them as much responsibility as you can, but make it clear that you're available to advise them when needed.

If they're less experienced:

- Give clear, step-by-step directions.
- Ask questions to confirm their understanding.
- Check in with them frequently.
- Refrain from giving them too much responsibility too quickly.
- Avoid pushing them to move ahead before they are ready.

If they're more experienced:

- Ask enough questions to elicit their concerns.
- Give them additional responsibilities when they seem ready for more challenges.
- Encourage them to take initiative.
- Make yourself available as an advisor.
- Ask them directly what kind of support they need.

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DIRECTING & DELEGATING TO THE C STYLE

How Does the C Style Like to Work?

People with the C style relate best to clear objectives and fact-based ideas. They take time to analyze concepts and closely examine solutions. Because they rely on logic and objectivity, your tendency to make decisions based on gut instinct may frustrate them. Furthermore, they're comfortable working alone, and they may even avoid the collaboration that you prefer. In fact, they require only very minimal face time and appreciate environments that foster independence.

Potential Problems When Working Together

These individuals want to produce dependable outcomes, so they tend to thoroughly consider all the consequences before choosing a plan. They prefer to go over options and proposals carefully, which is in contrast to your tendency to move quickly. Therefore, they may become annoyed if you pressure them to multi-task or rush their efforts, and they may see your push for exciting options as careless or sloppy. In turn, you may think their tendency to go over solutions repeatedly stands in the way of progress.

How to Be Effective with the C Style

People with the C style want to work in an environment where they feel free to point out flaws and question inefficiencies. You may believe that their objections stifle creativity, but remember that they are more concerned with high quality and getting things right. Those with less experience may spend too much time analyzing and perfecting their work, so be sure to check in often enough to keep them on track. For those with more experience, allow more autonomy but set clear deadlines that keep them moving forward.

If they're less experienced:

- Avoid forcing them to collaborate unless it's necessary.
- Help them achieve quality without putting deadlines at risk.
- Communicate with clarity rather than enthusiasm.
- Make sure they have the resources they need.
- Check in to make sure they aren't getting bogged down.

If they're more experienced:

- Check in when necessary to ensure forward progress.
- Encourage them to ask for more direction if they need it.
- Listen to their concerns about quality.
- Allow them to work independently when possible.
- Give them opportunities to help solve complex issues.

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MOTIVATION AND THE ENVIRONMENT YOU CREATE

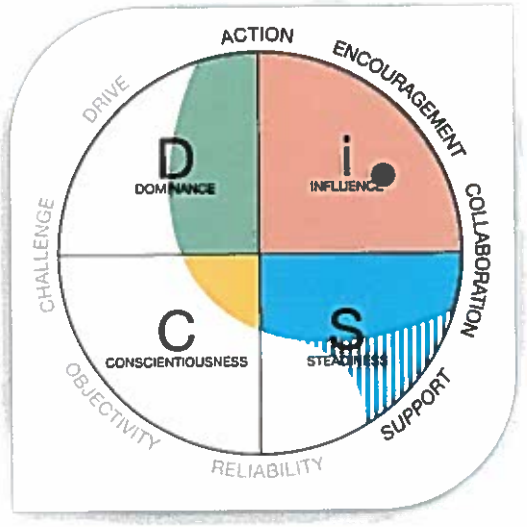
You can't motivate people. They have to motivate themselves. As a manager, however, you can create an environment where it's easy for people to find their own natural motivation. This means building an atmosphere that addresses employees' basic needs and preferences so they can do their best work, and you may naturally create a certain type of environment for those around you. It's important to understand the nature of this environment because it has a major impact on the motivation of the people you manage.

Casey, because you are **enthusiastic and encourage others**, the environment you likely create is one where people feel recognized and accepted. You probably help them see that work can be fun, and as a result, they may be more upbeat and optimistic about their tasks and contributions.

Most likely, your **tendency to take action** might help establish a high-energy setting where people want to get going and keep moving. The people you manage may be inspired by your fast pace, and your emphasis on forward momentum can help instill confidence that they are going to help make things happen quickly.

Similarly, your **strong preference for collaboration** may strengthen the bond among team members, which is often essential for reaching goals. People who feel that group efforts are appreciated are more likely to seek opportunities to brainstorm together and make improvements, without concern for who should receive the most credit.

Furthermore, unlike others with the i style, you have an extra priority that may influence motivation and the environment you create. Since you tend to **offer support**, the people you manage probably feel that someone cares about them, which can be extremely motivating for some.



The Environment You Create

- Because you deliver positive feedback, people feel good about their contributions.
- Your optimism and enthusiasm can make work more fun.
- Your passion and high energy may inspire people to move quickly.
- Because you build teams, people feel a sense of camaraderie.
- When you put confidence in others, they may feel empowered to use creative approaches.
- Because you are understanding and patient, workers are less frustrated when attempting new things.

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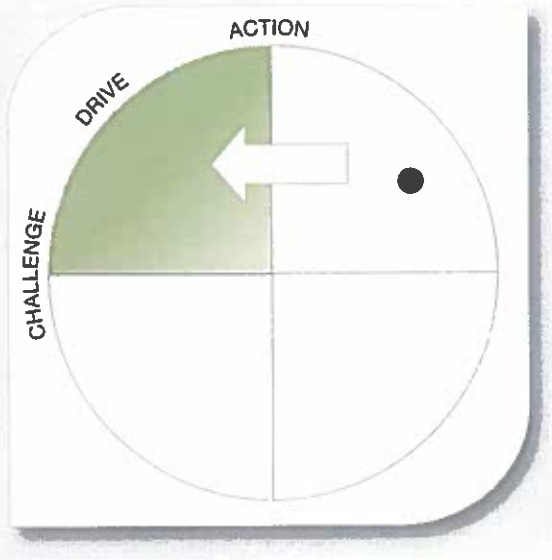
MOTIVATION AND THE D STYLE

What Are the Motivational Needs of the D Style?

Employees with the D style are motivated to win, so they probably care more about the bottom line than how they get there. They're driven to achieve, probably more so than you, so they often thrive in competitive environments and can sometimes turn the most collaborative task into a contest. Furthermore, they share your desire to move quickly and want to make a big impact with innovative or daring ideas. In fact, they may be so focused on individual career growth that they disregard the needs of others, and you may have trouble understanding their challenging approach.

What **demotivates** the D style?

- Routine
- Foot dragging
- Being under tight supervision
- Having their authority questioned or overruled
- Feeling like their time is being wasted
- Having to wade through a lot of details



How does **conflict** affect the motivation of the D style?

- Employees with this style may embrace conflict as a way to create win-lose situations.
- They may be energized by the competitive aspects of conflict.
- They may waste energy dwelling on who is at fault.

How can you help create a **motivating environment** for the D style?

- Let them know the value they bring to the organization.
- Don't overlook opportunities to allow them to work independently.
- Let them control their work environment as much as possible.
- Orchestrate healthy competitions that will contribute to team success.
- Challenge them with concrete goals meant to stretch their abilities.
- Explain the big-picture, bottom-line purpose of new projects.

What's the best way for you to **recognize and reward** the D style?

- Reward their top performances with more responsibility and autonomy.
- Compliment them directly when their initiative and drive help the organization.
- Give them credit for their work and ideas that lead to team success.
- Offer them opportunities for advancement when they seek new challenges.

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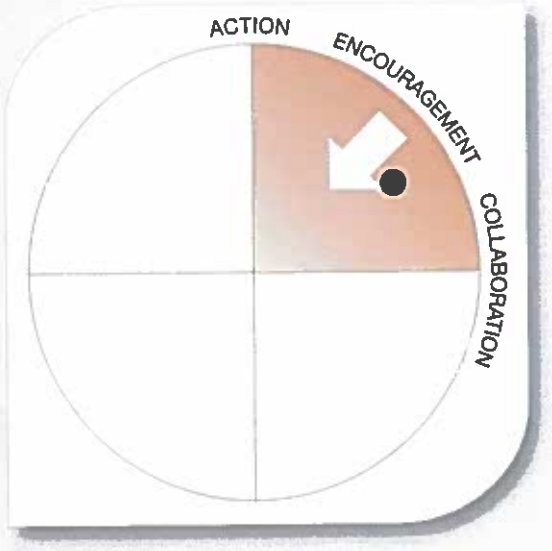
MOTIVATION AND THE i STYLE

What Are the Motivational Needs of the i Style?

Employees with the i style look for high-energy environments where adventurous or groundbreaking ideas are valued. They're eager to collaborate, as you probably are, so they're likely to put a lot of energy into socializing and maintaining relationships. Because they like fun, vibrant settings, they often move quickly and indulge in a variety of tasks, and you probably don't have much trouble keeping up with their fast pace. Those with the i style are also motivated by public recognition, and like you, they appreciate a warm and encouraging environment.

What **demotivates** the i style?

- Being isolated from others
- Working in a reserved, slow-paced setting
- Having their contributions go unrecognized
- Performing routine or repetitive tasks
- Wading through a lot of details
- Working with pessimistic or critical people



How does **conflict** affect the motivation of the i style?

- Conflict may make them emotional or angry, and as a result may negatively affect their performance.
- They may take conflict personally, which could de-energize them.
- They may dwell on the conflict rather than focus on their tasks.

How can you help create a **motivating environment** for the i style?

- Let them collaborate with you and others.
- Encourage their positive energy and give them opportunities to express themselves.
- Limit the predictability and routine of their tasks when possible.
- Reinforce their optimism with your natural enthusiasm and energy.
- Give them opportunities to be in the limelight.
- Provide some time to socialize without compromising results.

What's the best way for you to **recognize and reward** the i style?

- Praise them publicly, making sure the whole team knows when they've accomplished something great.
- Let them know that others appreciate the energy and enthusiasm they consistently bring to the table.
- Reward them by giving them opportunities to shine.
- Recognize their contributions by recommending them for awards or advancement opportunities.

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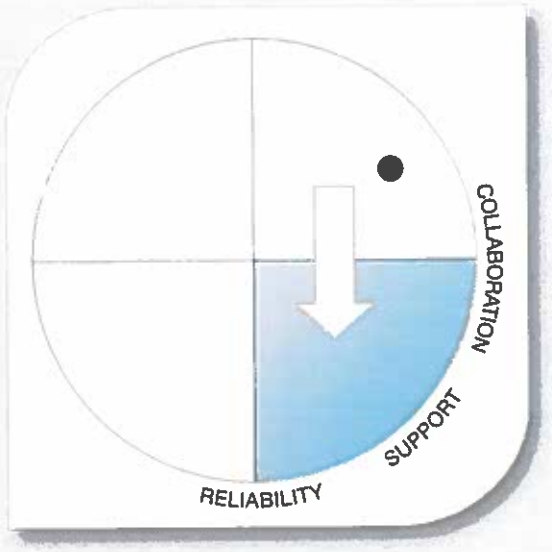
MOTIVATION AND THE S STYLE

What Are the Motivational Needs of the S Style?

People with the S style prefer a calm, structured atmosphere where tension and conflict are rare. Like you, they tend to be supportive, and may even withhold their own opinions to accommodate or please other people. In addition, they like to connect with colleagues on a personal level by working in a collaborative setting, and you may appreciate their affinity for teamwork. Furthermore, they want to be seen as reliable and to have enough time to perform their duties without being rushed or stressed, which probably isn't as important to you.

What **demotivates** the S style?

- Competitive environments
- Having to change direction abruptly
- Being rushed into quick decisions
- Dealing with cold or argumentative people
- Being forced to improvise
- Being in chaotic situations



How does **conflict** affect the motivation of the S style?

- They may compromise on things they care about but remain frustrated beneath the surface.
- They may waste energy worrying that people are mad at them.
- They may become fearful about making mistakes, limiting their effectiveness or ability to take chances.

How can you help create a **motivating environment** for the S style?

- Avoid rushing them for results, which may require you to slow your pace at times.
- Let them collaborate with others, but don't push them to be more social than they want to be.
- Be clear about their tasks and responsibilities, and don't skip the specifics.
- Plan ahead to be able to give plenty of warning when changes are coming.
- Give them the structure and security they need to feel comfortable.
- Ask for their ideas, which they might not share without encouragement.

What's the best way for you to **recognize and reward** the S style?

- Reward their steady contributions to team success by making them feel like a vital part of the team.
- Give them more responsibility, and let them know that you trust them to deliver reliable results.
- Offer sincere praise, but avoid putting them in the limelight.
- Encourage them to consider advancement opportunities when you feel that they're ready, since they're unlikely to ask.

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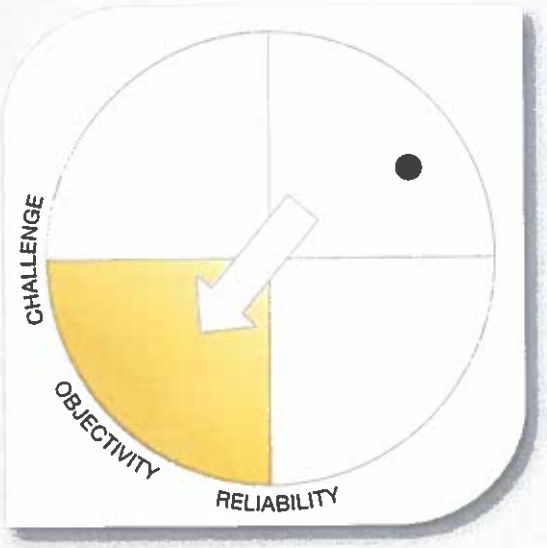
MOTIVATION AND THE C STYLE

What Are the Motivational Needs of the C Style?

Employees with the C style look for an environment where they will have time to analyze ideas and ensure flawless outcomes. They want to produce work that's reliable, so they prefer to maintain a moderate pace and exercise a sense of caution, which isn't one of your top priorities. Because they tend to be even more objective than you are, they like to weigh all the options and gather all the facts before making decisions. Also, they want to master their responsibilities, so they often challenge ideas to ensure accuracy, an approach you probably don't share.

What **demotivates** the C style?

- Being required to work collaboratively
- Receiving vague or ambiguous directions
- Having to deal with strong displays of emotion
- Being forced to let errors slide
- Having to make quick decisions
- Being wrong



How does **conflict** affect the motivation of the C style?

- They may become resentful and unyielding, limiting their productivity.
- They may withdraw from the situation to avoid having to deal with emotional reactions.
- Their unexpressive manner may conceal a tendency to worry excessively.

How can you help create a **motivating environment** for the C style?

- Explain the purpose of tasks logically rather than enthusiastically.
- Encourage them to help define quality standards.
- Listen to their insights about projects or tasks, and avoid dominating conversations.
- Provide opportunities for independent work rather than focusing on collaboration.
- Convey your expectations clearly and specifically.
- Give them plenty of time to process information.

What's the best way for you to **recognize and reward** the C style?

- Compliment them privately by highlighting specific aspects of their performance that stand out.
- Thank them for the unique contributions they make by ensuring high-quality outcomes.
- Reward them by providing new opportunities to complete challenging projects independently.
- Encourage their growth by offering to help them build expertise in new areas of interest.

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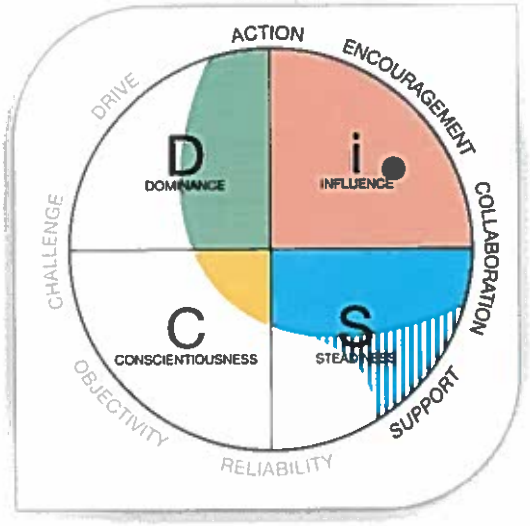
YOUR APPROACH TO DEVELOPING OTHERS

One of the most important but often overlooked areas of management is employee development. By development, we don't mean day-to-day direction on current job duties. Instead, we're talking about supporting employee's long-term professional growth by providing resources, environments, and opportunities that capitalize on their potential.

Certainly, your employees will need to work through those limitations that are significant obstacles to their growth. Research shows, however, that you'll be most effective as a manager if you can help your employees identify and build on their strengths, rather than trying to fix all of their weaknesses. Each manager has a natural approach to this development task, and your approach is described below.

Casey, you usually want the best for the people you manage, and this interest in their well-being often helps you address their development needs. Most likely, you're optimistic about people's abilities and encourage them to reach for their loftiest goals. When it comes to career growth, you may motivate people to take quick action and be creative as they find ways to use their strengths. And because you usually let people know that you're eager to help them develop, they probably feel comfortable approaching you with their questions and concerns. Overall, you find ways to give people confidence as they identify their talents and provide opportunities for them to showcase these talents.

Furthermore, unlike others with the i style, you also have an extra priority that might influence your approach to developing others. To you, developing others encompasses giving support and being there to assist people when they need it.



Your Development Approach

ADVANTAGES

- Encouraging creative or daring ideas for people's development
- Making yourself available for mentoring
- Boosting others' self-confidence with your belief in their abilities
- Pushing people to move quickly in their development
- Inspiring people to think big
- Taking the time to listen to people's real concerns

DISADVANTAGES

- Pushing people at a pace that doesn't allow them time to develop necessary skills
- Being unrealistically optimistic about some people's development options
- Failing to take a long-range view of people's development needs
- Putting too much emphasis on positive behaviors at the expense of addressing problems
- Failing to consider whether development plans are well-suited to the person
- Being too accepting when people fail to meet your expectations

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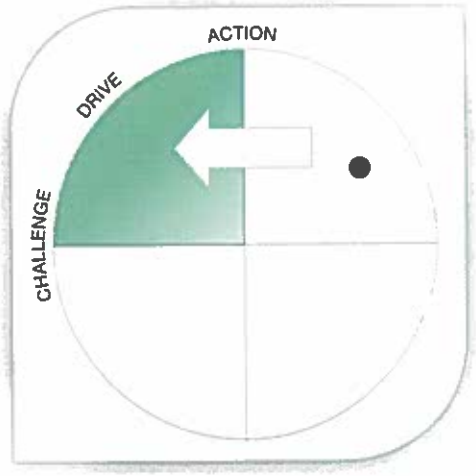
DEVELOPING YOUR "D" EMPLOYEES

Areas Where They Have Strong Potential



Consider ways that these employees and the organization can take full advantage of the following strengths:

- Willingness to take risks and challenge the status quo
- Comfort being in charge
- Confidence about their opinions
- Persistence through failure or tough feedback
- Competitive spirit and drive for results
- Ability to create a sense of urgency in others
- Comfort being direct or even blunt
- Restless motivation to take on new challenges
- Ability to find effective shortcuts
- Willingness to speak up about problems

Obstacles and Strategies in the Development Process

Drive

People with the D style are usually quite driven, so it may be important to ensure that their energy is channeled in the right direction. Otherwise, they may strive for their own goals and give less attention to the organization's needs. At times, you may need to rein them in and make sure their priorities align with those of the organization, which may require you to be more direct than is natural for you.

- Consider development opportunities that have the potential for impressive results.
- Be sure that they know the difference between individual and organizational goals.
- Encourage their ambition and autonomy, but be prepared to redirect their focus.

Action

Like you, people with the D style tend to move fast, so they may not believe they require any structure or long-term development plan. In your mutual zeal for rapid progress, the two of you may fail to plot out the details of their long-term growth. This is especially true if they are inexperienced or prone to make important decisions with very little information.

- Remember that they may insist on moving forward even without the necessary skill set.
- Help them slow down to think through their development path.
- Review the big picture and encourage them to come up with appropriate long-term goals.

Challenge

These individuals are more independent than you, and they may be strong-willed in pursuing their goals. As a result, they may challenge your leadership, especially if you are focused on collaborative efforts. Give them as much autonomy as you can without undermining your own authority, but don't allow them to avoid their responsibilities related to the group effort.

- Allow them to work independently to the degree that they don't damage team unity.
- Reassert your authority if necessary.
- Set up a system so they know when you are suggesting and when you are telling.

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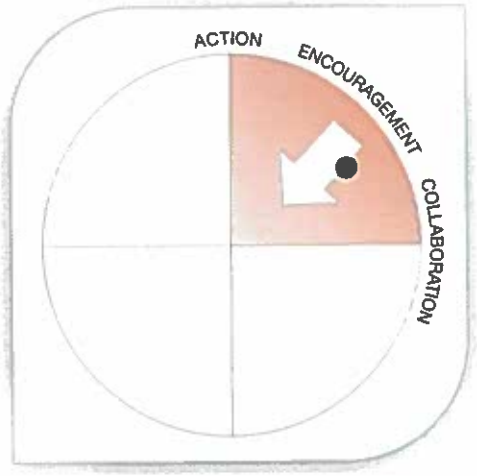
DEVELOPING YOUR "i" EMPLOYEES

Areas Where They Have Strong Potential



Consider ways that these employees and the organization can take full advantage of the following strengths:

- Ability to build a network of contacts
- Willingness to accept new ideas
- Interest in working with others
- Comfort taking the lead
- Persistence through optimism
- Tendency to create enthusiasm
- Ability to empathize with others
- Willingness to experiment with different methods
- Tendency to give praise and encouragement to others
- Ability to rally people around an idea

Obstacles and Strategies in the Development Process

Encouragement

People who share your i style want to know that they are doing a good job and are on the right development path, so they may appreciate your preference to focus on the positive while offering feedback. However, because you both tend to be optimistic, you may gloss over negative issues and ignore potential problems. Therefore, you may need to make sure that they understand which areas require improvement.

- Continue to be optimistic when assessing their development, but don't ignore problems.
- You may need to offer tougher feedback at times.
- Check to make sure they understand your feedback.

Action

Like you, these individuals are interested in fast-paced innovation, and they may avoid development opportunities that require in-depth analysis. Because you are equally likely to push for action, the two of you may come up with development plans that are vague or overly optimistic. Instead, it may be helpful to look at promising opportunities that might require more attention to detail.

- Encourage their spontaneity when appropriate.
- Point out the negative consequences of not taking the time to develop skills with deliberate effort.
- Avoid letting your mutual enthusiasm obscure important details or potential issues.

Collaboration

Like you, these individuals love working with other people, and this can be a great source of strength in their development. However, because you both value collaboration above individual accomplishment, the two of you may focus exclusively on collective efforts at the expense of personal goals. Remember that sometimes independent efforts are as important as teamwork when it comes to personal growth.

- Encourage them to pursue opportunities that involve working with others.
- Allow them to lead small groups.
- Remind them that their growth will also depend on independent work.

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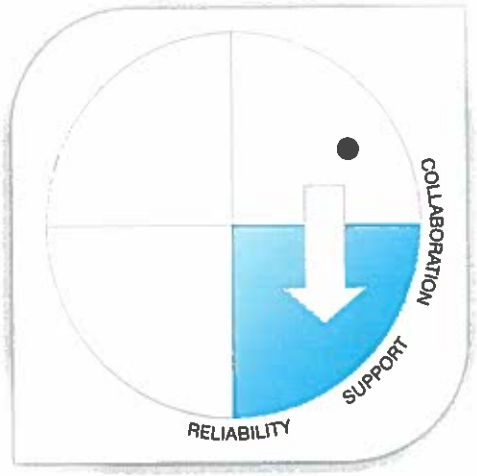
DEVELOPING YOUR "S" EMPLOYEES

Areas Where They Have Strong Potential

Consider ways that these employees and the organization can take full advantage of the following strengths:

- Ability to work with different types of people
- Interest in maintaining steady progress
- Tendency to be diplomatic
- Willingness to support team goals
- Ability to empathize with others
- Persistence to work on routine or highly detailed projects
- Tendency to follow through on commitments
- Ability to calm upset people
- Understanding of others' perspectives
- Willingness to be flexible to others' needs



Obstacles and Strategies in the Development Process

Support

While it's not typical for the i style, you tend to be supportive and offer the reassurance that people with the S style need. As a result, they probably appreciate the level of patience and consideration you extend to their development. Still, because you focus on people's emotional needs, you may not push them to reach beyond their comfort zones.

- Help them see the depth of their skills and abilities.
- Remind them that they have to focus on their own needs at times.
- Push them gently to grow and develop.

Reliability

They are dependable and stable. For this reason, they may feel that your development plans are too risky or adventurous. In addition, they may want more structure from you when it comes to laying out their professional future.

- Encourage them to look beyond the risk in bold development plans to see the opportunities.
- Give them time to warm up to ideas that involve a lot of change.
- Work with them to create specific development plans.

Collaboration

Like you, people with the S style are comfortable working with others, but their focus on collaboration may be at the expense of individual opportunities for growth. And since you both want harmonious relationships, you may have trouble providing tough feedback. Trying to avoid hurting their feelings may deprive them of constructive criticism that could help them down the line.

- Encourage them to pursue collaborative opportunities while furthering their own development.
- Show them that they have the strength to work autonomously.
- Offer constructive feedback when necessary.

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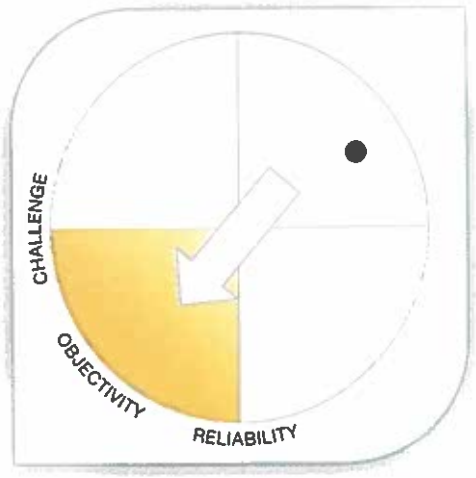
DEVELOPING YOUR "C" EMPLOYEES

Areas Where They Have Strong Potential

Consider ways that these employees and the organization can take full advantage of the following strengths:

- Insistence on quality
- Ability to look at ideas logically
- Comfort with studying the specifics
- Interest in maintaining error-free work
- Ability to pinpoint potential problems
- Persistence in analyzing solutions
- Willingness to work alone
- Tendency to avoid letting personal feelings interfere with work
- Ability to exercise caution and manage risks
- Interest in developing a systematic approach



Obstacles and Strategies in the Development Process

Objectivity

These individuals use logic to guide their actions, so they may believe that your more intuitive approach to development is misguided or sloppy. Because of their interest in progressing rationally, they may prefer to work in a "cave" when planning their development, and they may discount team unity and other people's feelings.

- Steer them toward analytical development opportunities.
- Respect their independence, but remind them to fill you in on their progress.
- Avoid forcing them to socialize, but reinforce the importance of teamwork.

Reliability

People with the C style want development opportunities that are clear and well planned, so they may reject your tendency to keep moving forward, leaving the specifics for later. Further, they may be less interested in your daring or innovative ideas for development, even though playing it safe isn't likely to lead to growth.

- Put development opportunities into a clear, well-organized framework.
- Encourage them to look beyond safe and predictable development plans.
- Ensure that they see the drawbacks of playing it safe.

Challenge

These individuals are often skeptical, so they may probe ideas for flaws even after others have accepted them. They frequently question solutions, which may be frustrating as you work with them to create a development path. And their tendency to say "no" may come across as dismissive or resistant.

- Expect that you'll have to back up your ideas with evidence if you want buy-in.
- Hold them accountable if they question your ideas in a disrespectful way.
- Give them time to think over your suggestions before making final decisions together.

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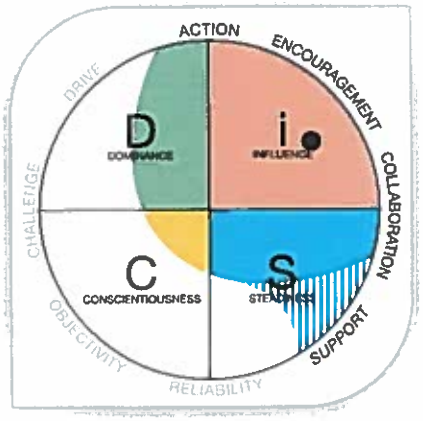
HOW YOUR MANAGER SEES YOU

One of the most important but often overlooked aspects of management is sometimes called "managing up." This refers to effectively working with and influencing your own manager. Understanding how your manager sees you is important, but sometimes difficult. This page provides insight into how your manager might see you.



▶ Encouraging

Casey, since you have an i style, you probably come across as enthusiastic and people-oriented. Your manager may appreciate your tendency to inspire people to keep a positive outlook. On the other hand, because you're sometimes overly optimistic, some managers may be concerned that you let your emotions cloud your judgment, while others may not identify with your emphasis on a lively work environment.

- Some managers may see you as unrealistically optimistic.
- Your manager may prioritize facts over passion.

▶ Active

Many managers will appreciate that you get going quickly on tasks and projects. Furthermore, they may like how your energetic push toward new opportunities gives the organization momentum. On the other hand, some managers may see your speed as sloppy or reckless, while others may worry that your excitement could cause you to overlook other important factors.

- Your manager may see shortcuts as evidence of sloppy work.
- Some managers may find your more adventurous ideas to be impractical or unrealistic.

▶ Collaborative

Because of your emphasis on teamwork, your manager probably feels comfortable that you'll gather a lot of input to create stronger solutions. Many managers may also appreciate your openness to ideas even if they didn't originate with you. However, your consistently collaborative approach may lead some managers to think that you're more interested in the group process than in getting things done.

- Your manager may think that you have trouble staying on task.
- Managers who stress independent work may want you to act decisively without involving others.

▶ Supportive

In addition, you tend to be supportive, which isn't typical of the i style, and many managers may see your willingness to help as a great asset in making their jobs less stressful. However, some managers may think you have trouble holding people accountable for subpar performances.

- Your manager may see you as overly lenient with people who are underperforming.
- Some managers may see you as too willing to compromise on goals rather than pressure others.

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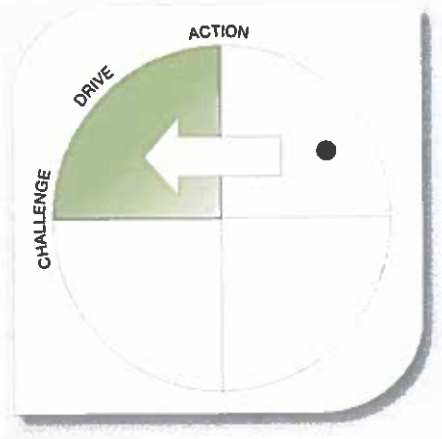
WORKING WITH "D" MANAGERS

Most of us would like to understand our own manager a bit better. If your manager tends toward D, here are some insights for working more effectively together.

Their Priorities & Preferences



Managers with the D style put a strong emphasis on drive and are active in pursuing bottom-line results. They can be demanding and blunt and won't hesitate to voice their skepticism. Overall, they respond best to people who can quickly help them achieve success.

- Unlike you, their drive for results may cause them to overlook people's feelings or make compromises to quality.
- Like you, they prioritize action and want to keep progressing at a rapid pace.
- Unlike you, they tend to openly challenge the status quo and pressure others to meet their high standards.

Advocating & Getting Buy-In

Managers with the D style want to see concrete results as fast as possible, so you may get buy-in by showing how your plan will quickly affect the bottom line. And because they respect confidence, your natural self-assurance might help your proposals get serious consideration. However, if you present your ideas enthusiastically without illustrating the substance, these managers may dismiss them as frivolous. Like you, they want to keep things moving quickly and may become frustrated when something or someone slows progress. Avoid unnecessary details, but be ready with facts in case they challenge your assumptions. Furthermore, they want to feel in control, so show respect for their leadership by offering them an ownership stake in the solution.

- Keep the focus on the bottom line.
- Project confidence in your ideas, but only when it's genuine.
- Avoid coming across as overly enthusiastic or passionate.

Dealing with Conflict

Managers with the D style can become competitive in conflict, creating win-lose scenarios in which compromise is seen as a sign of weakness. They aren't inclined to gloss over differences or avoid confrontation. This is probably quite a bit different than how you handle conflict, since you prioritize friendly relationships. When working with these managers, be careful not to brush past the issues. They're probably more frank than is comfortable for you, but remember not to take it personally. State your points objectively without getting defensive.

- Avoid viewing their directness as a personal attack.
- Don't gloss over disagreements just to keep things friendly.
- Keep the discussion focused on the issue at hand.

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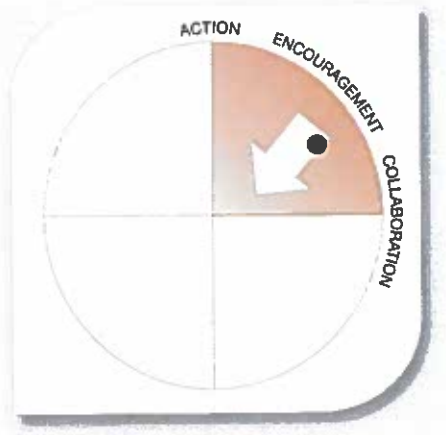
WORKING WITH "i" MANAGERS

Most of us would like to understand our own manager a bit better. If your manager tends toward i, here are some insights for working more effectively together.

Their Priorities & Preferences



Managers with the i style tend to be energetic and encourage others to do their best. Overall, they want to lead a fast-paced but friendly team, and they will likely respond best to people who like to create an optimistic team spirit.

- Like you, they give people recognition and celebrate group victories.
- Like you, they prefer to work with others and prioritize teamwork.
- Like you, they focus on action and move quickly while striving for forward progress.

Advocating & Getting Buy-In

Managers who share your i style look for cooperation and want to know how your plans will affect other people. Like you, they're interested in finding ways to interact, and they believe collaboration leads to better outcomes. To gain their buy-in, show them how team members can work together to reach your goals. Use your energetic approach to show them that your solution has the power to invigorate people, but avoid exaggerated claims that might mask legitimate flaws. Furthermore, they share your desire for fast movement and groundbreaking solutions, so lay out the big picture, and assure them that things will happen quickly once you have their buy-in.

- Emphasize how your ideas can quickly energize people.
- Discuss the effect of your ideas on other people.
- Refrain from overestimating an idea's true potential.

Dealing with Conflict

Managers who share your i style want to maintain friendly relationships. However, self-expression is very important to them, so they may demand to be heard in a conflict situation. Because you have a similar approach, you and an "i" manager may say harsh things to one another that are difficult to take back. Furthermore, you both may have trouble letting things go later. Therefore, when things get tense, express your concern for their feelings and a desire to work through the conflict quickly but thoroughly, and avoid personal attacks. Let them know that a disagreement now doesn't mean a poor relationship down the road.

- Avoid engaging in any personal attacks
- Acknowledge the importance of everyone's feelings.
- Make it clear that your relationship is still strong.

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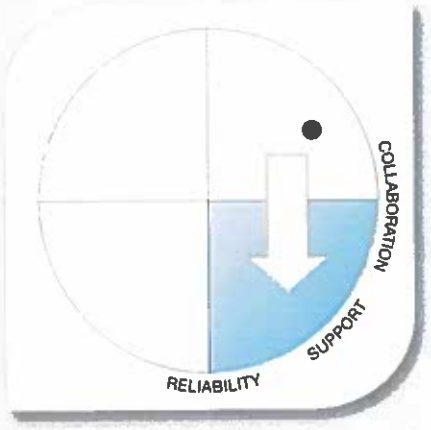
WORKING WITH "S" MANAGERS

Most of us would like to understand our own manager a bit better. If your manager tends toward S, here are some insights for working more effectively together.

Their Priorities & Preferences



Managers with the S style tend to be accommodating and dependable. Overall, they want to lead a team in a calm setting where tension is rare, and they will likely respond best to people who are friendly team players.

- Like you, they emphasize supporting others and have empathy for people's needs.
- Like you, they prioritize collaboration and want people to work together harmoniously.
- Unlike you, they often dodge change in order to maintain a dependable setting.

Advocating & Getting Buy-In

Managers with the S style want to see how your ideas can contribute to steady progress and reliable results. They are less spontaneous than you tend to be and would need time to prepare for any major changes that you might suggest. While they'll probably let you lead the discussion, remember that excessive enthusiasm is unlikely to help you gain their buy-in. Because they often weigh both sides of a decision, they may want more time to consider your proposal. Furthermore, like you, they're interested in collaboration and team unity. Capitalize on this mutual interest by specifying how your solution can create opportunities to bring the group together. And remember that if the plan feels disorganized, you may not earn their needed support. Present your ideas as clearly as you can, and be ready with details to address their concerns.

- Refrain from overwhelming them with your enthusiasm.
- Lay out your plan in a step-by-step manner.
- Emphasize how your idea helps people.

Dealing with Conflict

Managers with the S style want to avoid conflict whenever possible, so they may gloss over differences or even deny that there is a problem. Unlike others with the i style, you share their priority on support and also dislike addressing issues head-on. You may need to take a more direct approach to clear up disagreements. Don't assume their silence means the matter is resolved. Express your concern for their feelings and a desire to work through the conflict quickly but thoroughly. If you allow them to bury their feelings, resentment may build.

- Address the situation directly rather than masking your differences.
- Don't assume that their silence means they agree with you.
- Follow up to make sure the issue is resolved.

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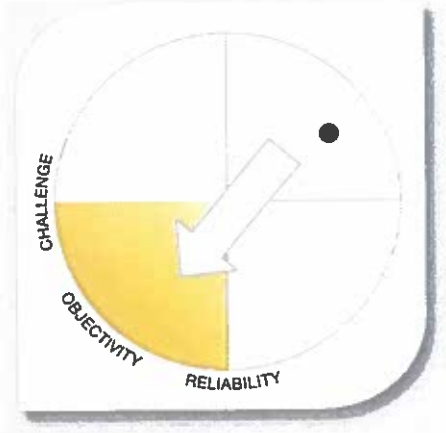
WORKING WITH "C" MANAGERS

Most of us would like to understand our own manager a bit better. If your manager tends toward C, here are some insights for working more effectively together.

Their Priorities & Preferences

Managers with the C style put a strong emphasis on logic and maintaining a stable environment. Overall, they want to lead by setting high standards, and they will likely respond best to people who share their concern for high-quality outcomes.

- Unlike you, they spend a lot of time on objective analysis to ensure accuracy.
- Unlike you, they tend to move cautiously in order to deliver a reliable outcome.
- Unlike you, they tend to show open skepticism for ideas that aren't backed up by facts.



Advocating & Getting Buy-In

Managers with the C style want to see how your ideas can lead to a high-quality solution. Because they want to anticipate potential issues or complications, they're likely to ask a lot of questions. For this reason, your big-picture focus may fail to get their buy-in. If you want them to act, prove your competence by utilizing facts and logic. Furthermore, they're more interested in reliability than speed, so you may need to slow down and show them that you've thought through all of the consequences of your plan. They're unlikely to respond well to overly enthusiastic presentations. In fact, if you come across as too passionate, they're more likely to view your efforts as chaotic and unsafe. By giving them the information they want and the time to process it, you will be much more likely to get them on your side.

- Lay out your plan clearly and avoid glossing over the specifics.
- Be ready to provide all the information they need to reach a decision.
- Refrain from overwhelming them with your enthusiasm.

Dealing with Conflict

Because managers with the C style view conflict as a disagreement over who is correct, they may avoid direct aggression and remain objective instead. If emotions begin to run high, however, they may withdraw or refuse to discuss the matter further. You tend to gloss over differences, but if forced to confront the situation, you may become emotional. In such cases, they may not understand your need to express yourself. Therefore, you may need to focus more on facts to make sure you hear their side of the story. Don't insist on immediate resolution since they may need time to process. State your position factually and give them time to present their side.

- Support your opinions with logic and facts.
- Refrain from making emotional appeals.
- Give them space to process before confronting the issues.

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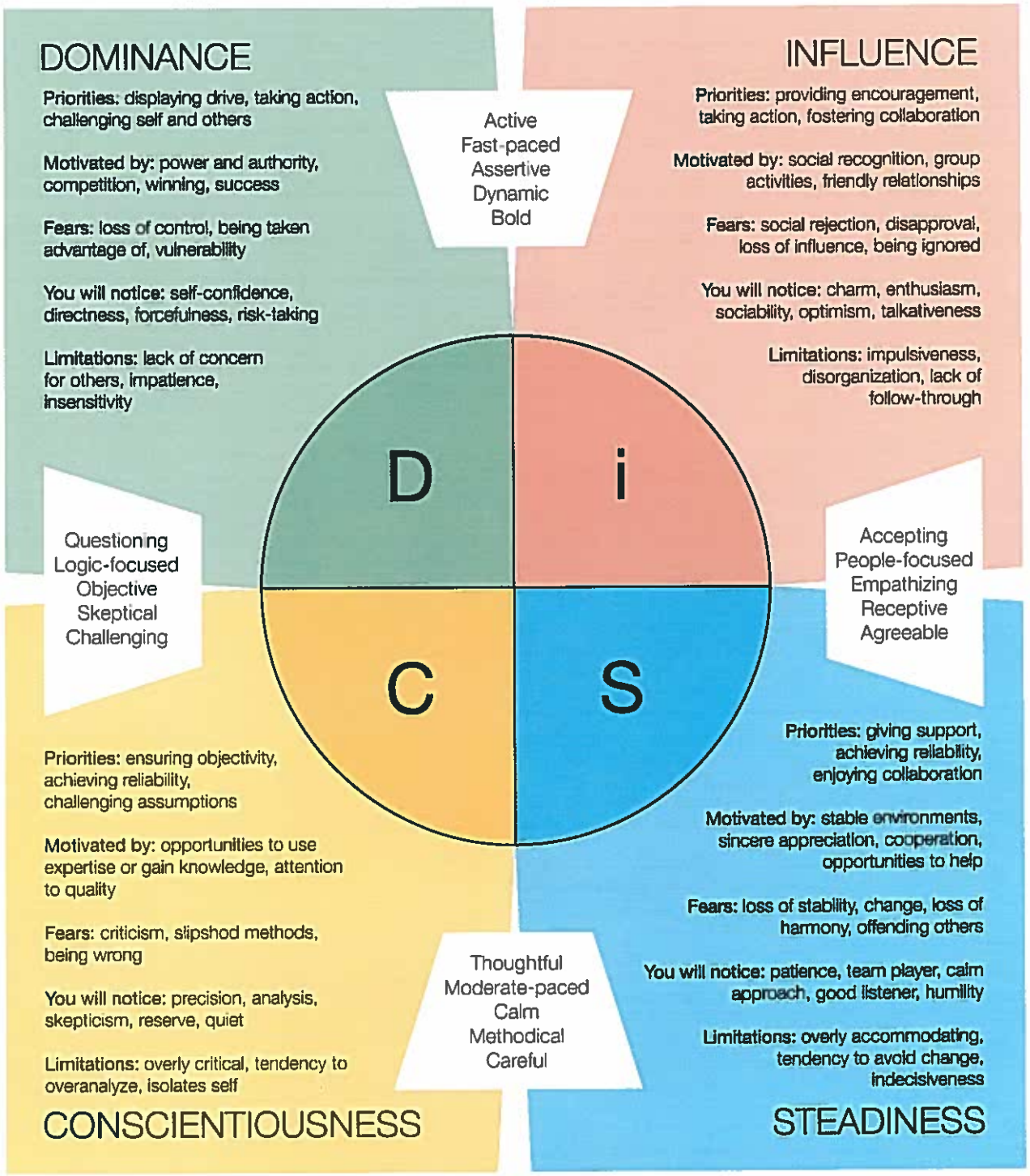
APPENDIX: OVERVIEW OF THE DiSC® STYLES

The graphic below provides a snapshot of the four basic DiSC® styles.



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