BOARD OF ALDERMEN
TENTATIVE AGENDA
JUNE 7, 2016
WORK SESSION
RAYTOWN CITY HALL
10000 E. 59TH STREET
RAYTOWN, MISSOURI 64133

WORK SESSION
IMMEDIATELY FOLLOWING THE 7:00 P.M. BOARD OF ALDERMEN MEETING

1. City Administrator Recruitment – Mayor McDonough

ADJOURN

10000 E. 59th Street
Raytown, MO 64133

Phone: (816) 737-6006
Fax: (816) 737-6097

CITY OF RAYTOWN

Memo

To:	Mayor and Board of Aldermen	From:	Debbie Duncan HR Manager
Date:	June 3, 2016	cc:	
Subject:	Work Session Recruitment Firm RFPs	Via:	

On May 26, 2016 staff contacted six national executive recruitment firms and asked for a proposal to recruit a City Administrator, including qualifications, scope of work, estimated timeframe and cost for services. Two firms declined, and four provided their proposals for consideration.

Mayor McDonough has asked for this item to be included in a Work Session for discussion with the Board of Aldermen on June 7, 2016

Attached:

- Summary of responses
- Copy of Proposals

Search Firm	Proposal	Cost	Est Timeframe	Provide	Warranty	Comments
GovHR	Received	20,000 plus candidate expenses	12 weeks	Position assessment; brochure and position announcement prep; candidate outreach; evaluation & screening; recommend candidates; provide interview questions and scoresheet; provide community meet & greet.	Will not recruit the candidate for first 5 years of employment; will continue the search if not satisfied with first round of candidates (additional cost if another consultant trip is needed); will repeat the search for expenses and announcement costs if candidate leaves within first 2 years.	Additional expense if need more than 10 recruitment reports and interview books (billed on per book charge). Brochures are electronic. If hard copies needed, w/b an additional $900. Includes 3 consultant trips; additional cost if more are requested.
Strategic Government Resources	Received	27,000 (NTE) plus candidate travel expenses	15 weeks; has completed in as little as 45 days but not recommended	Org. analysis; advertising & recruiting; screening & reviewing applicants; arrange interviews and prepare questions; reference checks; negotiate offer	Will not directly recruit for other jobs; fixed fee--no fees for expenses or additional trips; 24/7 cell phone and email access to SGR recruiter & CEO; will repeat if right candidate isn't found w/no additional professional fees; will repeat search w/no professional fees if candidate leaves within 2 years.	

Search Firm	Proposal	Cost	Est Timeframe	Provide	Warranty	Comments
Colin Baenziger & Associates	Received	24,500 (fixed) plus candidate travel expenses and reception	60-90 days	Recruitment & advertising materials prep; candidate outreach, screening, finalist interviewing, manager selection.	Will not recruit selected candidate as long as employed by City; will repeat the search for expenses only if selection leaves the city for any reason other than act of God within the first 2 years; will repeat the search if not satisfied with candidates they recommend.	City to coordinate lodging for non-local candidates; arrange reception, reimburse candidates for travel expenses. $150/hr for any work outside of agreed upon scope.
Springsted (Waters & Co)	Received	24,500 (NTE) plus candidate travel expenses	12-14 weeks	Profile development; advertising; applicant outreach; screening, assessment and recommendation of candidates; background check; on-site interviews	Will not directly recruit for other jobs; will repeat if right candidate isn't found w/no additional professional fees; will repeat search w/no professional fees if candidate leaves within 2 years.	Additional services outside the scope of work will be billed at $220/hr once approved.
Bob Murray & Associates	Declined					
Austin Peters Group	Declined					Assisting Harrisonville

May 26, 2016

Debbie Duncan
Human Resources Director
City of Raytown
10000 E. 59th St.
Raytown, MO 64133

Dear Ms. Duncan:

Thank you for the opportunity to provide you with a proposal for the City of Raytown's City Administrator recruitment and selection process. GovHR USA 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 USA is a public management consulting firm serving municipal clients and other public sector entities on a national basis. We work exclusively in the public sector, offering customized executive recruitment services, as well as providing other management studies, temporary staffing and related services for communities, counties, intergovernmental organizations and not-for-profit organizations that serve local government. GovHR USA is co-owned by Heidi Voorhees, President, and Joellen Earl, CEO. GovHR is a certified woman owned business firm in the State of Illinois.

GovHR USA was established in 2009 as Voorhees Associates, LLC. In January, 2014 Voorhees Associates combined with GovTempsUSA to form GovHR USA. This combination enables us to more effectively serve our clients by utilizing our combined resources to provide not only executive recruiting and management consulting, but also temporary staffing solutions, including short-term, long-term, and interim placements. Our headquarters offices are in Northbrook, Illinois.

Prior to 2009, Ms. Voorhees and a number of current GovHR USA consultants worked for The PAR Group, a public sector national consulting firm established in 1972. Ms. Voorhees began working for The PAR Group in 2001 and served as its President from 2006-2009. She has conducted more than 220 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 years of executive recruitment and management consulting experience, Ms. Voorhees has 19 years of local government leadership and management service with the Villages of Wilmette and Schaumburg, Illinois, as well as the City of Kansas City, Missouri. 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.

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

Philosophy

Executive search is an important decision-making process for a community; our primary goal is to help our client to make a good 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.

Experience

GovHR USA has completed 309 recruitments since its establishment in 2009. Our consultants are experienced executive recruiters who have conducted over 500 recruitments, working with cities, counties, special districts and other governmental entities of all sizes throughout the country. In addition, we've held leadership positions within local government, giving us an understanding of the complexities and challenges facing today's public sector leaders.

Consultant Assigned

GovHR USA Senior Vice President Lee Szymborski will be responsible for your recruitment and selection process.

Lee Szymborski is a Senior Vice President with GovHR USA, working on both executive search and general management consulting assignments. He has more than 33 years of experience in local government administration.

Mr. Szymborski's experience spans both Wisconsin and Illinois communities. Mr. Szymborski served more than 15 years as City Administrator in Mequon, Wisconsin. Mequon is a full service city with $30 million in combined budgets, and more than 170 employees serving 23,000 residents. In addition to his Wisconsin service in Mequon, he also worked for the City of Wauwatosa and Milwaukee County. In Illinois, he served for 12 years as Assistant Village Manager in Buffalo Grove.

Mr. Szymborski's track record points to a results-oriented approach to municipal government management. That is demonstrated by his work including the purchase of a $14 M private water utility that has seen its customer base increase under city ownership (Mequon); reorganizing city departments and reducing workforce costs in an organizationally sensitive manner (Mequon); spearheading a 10- community oversight committee to secure the startup of commuter rail service (Metra) on the WI Central railway (Buffalo Grove); and re-purposing TIF funds to provide incentives that secured a $16 M mixed-use development in Mequon's Town Center. He is additionally skilled in budgeting, personnel administration, community engagement efforts and strategic planning.
Mr. Szymborski's experience in recruiting key staff extends back to his management roles in both Buffalo Grove and Mequon. In Buffalo Grove, he handled for the Village Manager all aspects of recruiting department heads and other members of the management team. In Illinois, he was also the chief recruiter for executive director positions for two intergovernmental agencies serving the northwest Chicago suburbs. During his 15 years in Mequon, Mr. Szymborski recruited all members of the City's management team.

Since joining GovHR USA in 2014, Mr. Szymborski has assisted or managed more than 25 executive searches for communities in Wisconsin, Illinois, Missouri and Massachusetts. His recent searches include City and County Administrator and department head positions for the Wisconsin communities of Cedarburg (Town), Hartford, Lake Geneva, Waukesha, Franklin, Wausau and Eau Claire County; and he has also assisted or managed local government and intergovernmental agency searches in Illinois, Missouri and Massachusetts. He has done management studies for several Wisconsin communities and has facilitated strategic planning retreats and written plans for the City of Eau Claire and the Wisconsin City/County Management Association. He has also been part of GovHR USA's classification and compensation studies in several Wisconsin and Illinois communities.

Mr. Szymborski has published articles in Public Management magazine, and is an adjunct instructor at Upper Iowa University – Milwaukee Center. He holds a B.A. in Political Science, and an M.S. in Urban Affairs, both from the University of Wisconsin – Milwaukee. He is a past-president of the Mequon-Thiensville Sunrise Rotary Club, where he has been an active member since 1999. Mr. Szymborski serves on the Board of Directors for the Mequon Nature Preserve. He was the 2014 recipient of the Mequon – Thiensville Chamber of Commerce's Distinguished Service Award.

SCOPE OF WORK

A typical recruitment and selection process can take 175 hours to conduct. At least 50 hours of this time is "administrative" including ad placement, acknowledgment of résumés, reference interviews, and due diligence on candidates. These tasks may take longer if someone is performing them for the first time. We believe our experience and ability to professionally administer your recruitment will provide you with the best possible outcome. GovHR USA clients are kept informed of the progress of a recruitment throughout the recruitment process. Consultants are always available to provide information and answer questions, and details of the process such as placement of advertising and applications received are discussed in regular updates via either telephone or email.

GovHR USA 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:

- **Interviews** with the Board, and the City's senior staff as well as any other individuals you deem appropriate to best understand the responsibilities, challenges, and culture of the City.

  At least eight (8) hours of one-on-one interviews will be conducted with elected officials, staff and the public in order to develop our Recruitment Brochure. This important document outlines the expectations that the City has for its next City Administrator, providing us with the information we need to target our recruitment. During this process we will assist you with establishing the salary for the City Administrator by conducting a salary survey of comparable communities, if so desired.

- Development of a **Position Announcement**.

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

- Agreement on a detailed **Recruitment Timetable.**

Phase II – Advertising, Candidate Recruitment and Outreach

Phase II will include the following steps:

- Placement of the Position Announcement in appropriate professional online publications. In addition to public sector publications and web sites, outreach will include LinkedIn and other private sector resources. We can provide the City with placement recommendations, if so desired.

- The development of a database of potential candidates unique to the position and to the City of Raytown, 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.

- Outreach will be done through e-mail and telephone contacts as appropriate. GovHR USA 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 and experience as well as their interpersonal skills. This is an hour long interview, asking specific questions about their experience and skill set. This allows us to ask follow up questions and probe specific areas. It also provides us with an assessment of their verbal skills and their level of energy for and interest in the position.

- Formal and informal references (two per candidate) and an internet 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 USA, ensuring Raytown's process is professional and well regarded by all who participate.

Phase IV – Presentation of Recommended Candidates

Phase IV will include the following steps:

- GovHR USA 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. As résumés come in all different formats, these "mini" résumés will give you a clear, consistent look at each candidate "at a glance."

- GovHR USA will provide you with a log of all candidates who applied. You may also review all of the résumés should you so desire.

- GovHR USA will meet with you 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 with you to bring the candidates to "life" by reviewing their telephone interview and providing excerpts from two (2) references we will have done on the individual.

Phase V –Interviewing Process

Phase V will include the following steps:

- At the Recommendation meeting, the Interviewing Process will be finalized including the discussion of any specific components you deem appropriate, such as a writing sample.

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

- GovHR USA will work with you to develop an interview schedule for the candidates, coordinating travel and accommodations. The schedule will incorporate a tour of City of Raytown facilities and interviews with Department Heads and elected officials.

  We offer a community "Meet and Greet" option, at no charge, as a means for the community to interact and get to know the candidates in an informal setting. At this "Meet and Greet," candidates would give a brief overview of themselves and answer questions from the audience.

- 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. Using the candidate's name and work experience we review the top 200 search results available from Google, as well as his/her activity (if publicly available) on Facebook, Twitter, and other social media platforms. Employment verification can also be provided if so desired.

  GovHR USA recommends a two-step interviewing process with (typically) five 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 a "score sheet."

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

Phase VI – Appointment of Candidate

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

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

Optional 360° Evaluation

As a service to the City of Raytown, we offer the option to provide you with a proposal for a 360° performance evaluation for the appointed City Administrator at about six months into his or her 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:

On-site interviews of Raytown officials and staff, development and approval of recruitment brochure Deliverable: recruitment brochure	weeks 1-2
Placement of professional announcements; candidate identification, screening, interview and evaluation by consultant	weeks 3-8
Consultant recommendation to Board of qualified candidates Deliverable: recruitment report	week 9
Selection of candidate finalists by Board; additional background and reference checks, report preparation and presentation Deliverable: interview reports including suggested questions and evaluation sheets	week 10
Interviews of selected finalist candidates; Board selection of final candidate; negotiation, offer, acceptance and appointment	weeks 11-12

Summary of Costs

Recruitment Fee:	$13,000
Recruitment Expenses: (not to exceed)	5,000
Expenses include consultant travel, candidate outreach, and candidate due diligence efforts..	
Advertising costs	2,000
Total Fees:	$20,000*

Expenses include billing the client for up to 10 recruitment reports and 10 interview books. Clients requesting additional copies will be billed an additional per-book charge which may then exceed the estimated expenses. Advertising costs over $2,000 will be placed only with client approval. If less than $2,000, Client is billed only for actual cost.

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

The above cost proposal is predicated upon three consultant visits to Raytown; the first for the recruitment brochure interview process; the second to present recommended candidates; and the third for the candidate interview process. Any additional consultant visits requested by the Board may result in an increase in the travel expenses and those expenses will be billed to the client.

Payment for Fees and Services

Professional fees and expenses will be invoiced as follows: Recruitment expenses and the costs for the Recruitment Brochure printing will be itemized with sufficient detail and invoiced as incurred. In addition, the Recruitment Fee will be invoiced in three (3) equal payments, billed during the course of the recruitment. The first invoice for the Recruitment Fee will be sent upon acceptance of our proposal. The second invoice will be sent following the recommendation of candidates and will include any expenses incurred to date. The final invoice will be sent upon completion of the recruitment assignment and will include all remaining expenses. Upon receipt of each invoice the City will approve payment in accordance with its claims procedures within thirty (30) days of receipt.

GovHR USA Guarantee

It is the policy of GovHR USA to assist our clients until an acceptable candidate is appointed to the position. Therefore, no additional professional fee would be incurred should the Board 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 Raytown beyond the planned three visits.

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

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 USA?

The heart and soul of a professional recruitment firm is the expertise it brings to its clients. GovHR USA consultants are all experienced local government executives who have demonstrated careers and expertise that brings first hand knowledge of the disciplines in which they now consult. This knowledge can assist clients in designing the appropriate interview questions, the development of written and oral exercises to best assess candidates' abilities, and facilitation of the clients' discussion of the candidates.

Our process reflects the client's goals and objectives—therefore, the time we spend developing the Recruitment Brochure is critical in our understanding of the challenges, opportunities, and culture of the position under consideration. Our candidate assessment and interviewing skills are based on thousands of interviews over the course of our Consultants' many years of experience in the recruitment and selection field. This professional familiarity allows us to be sensitive to the nuances, not only the obvious. In addition, as experienced local government professionals, our Consultants are able to ask probing, thoughtful questions and effectively evaluate the candidates' answers. We provide the client with a diverse list of potential candidates who have been fully vetted by our staff and who are truly interested in and well-qualified for the position. We respect the confidentiality of candidates' applications and are respectful of the candidates' current employment situation when we conduct reference calls. We are not a gatekeeper—clients will be provided with a list of everyone who applied and may view the résumés should they so desire.

Our firm's executive recruitment standards embrace a professional process of integrity, trust, and respect toward all parties involved and a commitment toward meeting the expressed needs and desires of our Client. Our ultimate goal is for the client to be completely satisfied with the selected candidate.

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

ACCEPTED BY THE CITY OF RAYTOWN, MISSOURI

BY: _____

TITLE: _____

DATE: _____

GovHR USA
Voorhees Associates GovTempsUSA

Announces a Recruitment For

CITY MANAGER

For THE CITY OF FERGUSON, MISSOURI

GovHR USA, LLC is pleased to announce the recruitment and selection process for City Manager for the City of Ferguson, Missouri. The Mayor and City Council for Ferguson are seeking candidates who are visionary, confident leaders comfortable addressing racial issues and with demonstrated experience working with diverse communities and in developing diverse organizations. This brochure provides background information on the City of Ferguson as well as the additional requirements and expected qualifications for the City Manager's position. Additional information about Ferguson can be found on the City's website: http://www.fergusoncity.com/.

Candidates interested in applying for the position should submit their résumé and cover letter, along with contact information for five work-related references by September 26, 2015 to www.govhrusa.com/current-positions/recruitment. Questions regarding this opportunity should be directed to the Executive Recruiter working with the City of Ferguson.

Heidi Voorhees and Joellen Earl
Owners

GovHR USA/Voorhees Associates
650 Dundee Road, Suite 270
Northbrook, IL 60062
TEL: 847-380-3240
FAX: 866-401-3100
Formal applications should be submitted to:
www.govhrusa.com/current-positions/recruitment

Community of Choice
FERGUSON
EST. 1894

PROFESSIONAL ANNOUNCEMENT

Ferguson, MO (pop. 21,111) The Mayor and City Council for Ferguson, Missouri are seeking strong communicators who are personable, energetic, confident leaders to serve as the city's next City Manager. Located 12 miles west of St. Louis in St. Louis County, Ferguson has a $24 million budget and 110 full-time and 40 part-time employees. The next City Manager can expect to work closely with elected officials who are cohesive, thoughtful and dedicated to moving Ferguson forward. In addition, the City's employees are dedicated and hardworking, and open to a highly collaborative leader and Manager. The next City Manager must be a natural communicator, very comfortable with the media, community organizations, residents and business leaders. The next City Manager must have experience working in a racially diverse community, with the ability to build consensus with many stakeholders to move forward on the community's priorities. Additional specific skills sets include financial planning and budgeting, economic development, organizational development and succession planning. The next City Manager will be someone who embraces community involvement and visibility, with a strong desire to attend the City's neighborhood meetings, farmer's market, concerts in the park, July 4th and other events as well as be out in the community, interacting with residents and businesses. The City of Ferguson operates under a charter with a strong Council-Manager form of government. The City Manager is appointed by the Mayor and City Council and is responsible for the appointment and supervision of the department heads. Candidates must possess a Bachelor's degree in public administration, business administration or related field. A Master's degree in public administration or business or other advanced degree is highly desirable. Credentialed Manager candidates a plus. Candidates should have a minimum of ten years of increasingly responsible leadership and management experience. Salary is $120,000+ DOQ. Residency in Ferguson within a reasonable period of time is required. Submit résumé, cover letter and five references to GovHR USA online application system by September 26, 2015 to Heidi Voorhees or Joellen Earl at GovHR USA. www.govhrusa.com/current-positions/recruitment.

COMMUNITY BACKGROUND

The City of Ferguson, (population 21,111) is located twelve miles northeast of downtown St. Louis and six miles east of St Louis International Airport in North St. Louis County. The City of Ferguson was incorporated in 1894. Ferguson comprises seven square miles and is an ethnically, racially and economically diverse community. The community's neighborhoods have established neighborhood associations that have block parties and movie nights and participate in National Nite Out.

The Ferguson Citywalk district, in historic Downtown Ferguson, has been a hub of commercial activity for more than a century. Situated on ten pedestrian-friendly blocks along Florissant Road, Airport Road and Church Street, the district is home to a wide array of restaurants, specialty shops, art and music venues, and personal service businesses.

Throughout the year, Citywalk hosts some of the best concerts, community festivals, and fine art events found in the St. Louis area, including the annual Fourth of July Parade, concerts, Northern Lights Celebration, and Street-Fest, a two-day gala that draws thousands to Ferguson each September.

Citywalk is also home to the award-winning Ferguson Farmers Market, which is considered one of the best markets in the entire St. Louis region.

Education and Healthcare

Students living in Ferguson and attending public schools are served by four districts: Ferguson-Florissant School District, Hazelwood School District, Jennings School District, and Riverview Gardens School District. The majority of students living in Ferguson attend schools within the Ferguson-Florissant District.

Fully accredited by the state of Missouri, the district provides an excellent comprehensive educational program for more than 11,000 children from preschool through 12th grade. The district is comprised of 17 elementary schools, three middle schools, three high schools and one alternative school as well as a nationally-recognized early education program, the Probe gifted education program, the award-winning Challenger Learning Center and the Little Creek Nature Area.

The Ferguson-Florissant School District has earned a national reputation as an innovative educational leader, and all schools continually strive to provide the highest quality instructional program for all students.

Private schools are also available in and around Ferguson—Blessed Teresa of Calcutta School, Our Lady of Guadalupe School, and North County Christian School.

Ferguson is home to a St. Louis Community College campus which is located on 108 acres of rolling hills and has an enrollment of 7,400 students. The University of Missouri at St. Louis is located immediately adjacent to Ferguson in Cool Valley. Both colleges are excellent resources for Ferguson residents and businesses.

Healthcare is available for residents at Northwest HealthCare Christian Hospital in Florissant. Christian Hospital is a 485-bed acute care facility that is recognized as a place where people want to work to help people enjoy life by improving their health. Also nearby, is St. Luke's Pediatric Care Center in Chesterfield. St. Luke's is a 493-bed, not-for-profit hospital that specializes in more than 60 different medical areas. It is a regional healthcare provider dedicated to improving the quality of life for patients and the community.

Open Space and Recreational Opportunities

The City of Ferguson recently completed the construction of a 25,000 square foot community center that includes work out facilities, a gymnasium, computer lab, teen center, senior citizen gathering place, and numerous other amenities. The City has 11 beautiful parks spread out over 106 acres. The January Wabash Park is approximately 24 acres and is home to the Wabash Aquatic Complex, a 5.5 acre lake, bandshell, playground, sand volleyball court and several multi-purpose walking and bike trails.

The Ferguson Sports Complex is located on 21 acres and is home to four lighted softball fields, two lighted soccer fields, basketball courts, tennis courts, a multi-use trail and numerous other amenities.

Each year the City hosts a very popular and well attended Ferguson Twilight Run that includes a 5K, 10K and Fun Run.

Economic Development

Ferguson has an enviable location just 10 minutes from Lambert International Airport, 15 minutes from downtown St. Louis, and minutes from Interstates 70, 170 and 270. Home to smaller, successful local businesses as well as larger big box businesses such as Walmart and Home Depot, residents can find nearly everything they need within the community. Ferguson is also home to the corporate headquarters of Emerson Electric, a Fortune 500 company that is a global manufacturing and technology company with more than 200 manufacturing locations around the world. In addition, Ferguson is adjacent to NorthPark, a 500-acre premier business park that will host over five million square feet of mixed use space. Approximately one million square feet of development has taken place to date. NorthPark is also a designated Foreign Trade Zone and an Enhanced Enterprise Zone.

Centene Corporation is currently constructing a claims processing facility in Ferguson, which will employ 200 individuals and includes an on site day care center. Many of the businesses impacted by the protests have rebuilt or are in the process of rebuilding.

Ten years ago, the City of Ferguson created a Tax Increment Financing District in the downtown that included streetscape improvements and business incentives. Ferguson is currently collaborating with its neighbor Dellwood on a Great Streets Project that includes $2.5 million in transportation improvements on West Florissant Avenue. The East-West Gateway Council is coordinating the project, which is funded through federal, state and local funds. The New West Florissant Business Association was recently founded in an effort to further the rejuvenation of the West Florissant business district.

FERGUSON HISTORY

In the 1850s, William B. Ferguson, in true entrepreneurial fashion, agreed to deed a strip of land through his farm to the North Missouri Railroad, later known as the Wabash Railroad. This was done on the condition that they build a depot on his land and make it a regular stop. This stop, known as Ferguson Station, became the center of activity around the area, and Mr. Ferguson subdivided his land and sold lots to businesses and homeowners. By 1894, population had reached 1,000 and the town of Ferguson Station was incorporated as a fourth class city.

The city boomed during the post-World War II era. Commuter trains were replaced by automobile traffic. Plentiful employment was provided by new industries, including the relocated headquarters of Emerson Electric Company. Scores of new homes were built and the city's population continued to expand. In 1954, Ferguson became a charter city, one of the first in St. Louis County to adopt the council-manager form of government.

FERGUSON IN THE NEWS

Ferguson has been the site of periodic demonstrations and protests since the August 9, 2014 shooting of Michael Brown by a Ferguson police officer. The Department of Justice has issued a report following their investigation of the Ferguson Police Department and the Ferguson Municipal Court. The report outlined numerous recommendations for City officials to review and consider enacting. The previous City Manager, Municipal Court Judge, Municipal Court Clerk and Police Chief resigned following the release of the report in March 2015. The City is currently served by an Interim Police Chief and an Interim City Manager. A new Municipal Court Judge has been appointed. The Mayor and City Council for Ferguson continue their discussions with the Department of Justice regarding the implementation of the Justice Department's recommendations.

THE MUNICIPAL ORGANIZATION

Overview

The Mayor and City Council for the City of Ferguson are elected for three-year terms and can serve three terms. The six council members are elected by ward and the Mayor is elected at large. Three new council members were elected in 2015. Three council members are up for election in the spring of 2016 and one of those council members has reached the three-term limit. The next Mayoral election is in 2017. The current Mayor and City Council work collaboratively with the staff in addressing the City's current challenges and future opportunities.

The City has approximately 110 full-time employees and 40 part-time employees. While there have been some leadership changes, nearly all of Ferguson's employees have stayed with the City and are dedicated to the delivery of high quality municipal services. The City has a total budget of $24 million with the General Fund approximately $12 million. The Interim City Manager is assisted in the administration of his duties by an Assistant City Manager (who currently has oversight of Public Works, Parks and Recreation, and Planning), a Finance Director (who has oversight of the Municipal Court), an Interim Police Chief, Fire Chief and Human Resources Manager. The City also has a contracted media team on site to assist with public information and media requests.

In 1954, the City of Ferguson became a charter city and one of the first cities in St. Louis County to adopt the council-manager form of government. The City Manager is the chief executive and administrative officer of the City of Ferguson and is responsible to the City Council for the proper administration of the affairs of the City. The City Manager in Ferguson has the following powers and duties, outlined below:

Powers & Duties

- Appoint (or hire), supervise, and, when necessary, remove all employees of the City, except the City Clerk, who is appointed by the City Council.
- Direct and supervise the administration of all departments, offices, and agencies of the City, except as otherwise provided by the charter or by law.
- Create and update all job descriptions for employees of the City not otherwise prescribed by the city charter or by law.
- Prepare an annual budget and submit it to the City Council. Implement the budget and be responsible for its administration after adoption.
- Prepare and submit to the City Council, as of the end of the fiscal year, a complete report of the finances and administrative activities of the City for the year.
- Keep the Council advised of the financial condition of the City and make recommendations concerning its future needs.

- Attend all meetings of the City Council and as many committee meetings as possible. The City Manager takes part in City Council discussions but has no voting power.
- Enforce all laws and ordinances and see that all contracts and franchises are faithfully performed.

CHALLENGES AND OPPORTUNITIES

The next City Manager for Ferguson can expect to work with the Mayor and City Council on the following (not in order of priority):

- City officials continue to meet with the Department of Justice (DOJ) regarding the implementation of the DOJ recommendations. The next City Manager can expect to work closely with the elected officials on funding and ongoing administration of the recommendations.
- The City's fiscal year began July 1 and while the City's budget has been adopted, there is a predicted $2 million deficit. The City has reserves but additional cost containment measures will need to be considered within this fiscal year. The Interim City Manager, Finance Director and Mayor and City Council are discussing a wide variety of options to improve the City's fiscal health.
- The City Manager will work closely with the Mayor and City Council to continue to move Ferguson forward with a new vision for the community that will require frequent communication with residents, busi-

nesses, community organizations and the media as well as a continued conversation on race relations and the relationship between the Police Department and the community.

- The next City Manager will need to assess the municipal organizational structure and develop a leadership model that is based on communication throughout all levels of the municipal organization and effective service delivery in the face of budget constraints.

- The next City Manager will continue to develop sustainable partnerships with the educational and not-for-profit community to assist Ferguson's youth. The City currently sponsors the Ferguson Youth Initiative, which engages young people in middle school and high school. Other efforts include working with the Urban League, the school district, and the business community to further develop youth initiatives and programs.

FERGUSON CITY MANAGER OPPORTUNITY

As mentioned in the beginning of this brochure, the Mayor and City Council for Ferguson are seeking visionary, confident leaders comfortable addressing racial issues and with demonstrated experience working with diverse communities and in developing diverse organizations. In addition, candidates ***must*** be completely comfortable interacting with the media, including the national media.

The following education, experience, management, and leadership criteria have been identified by the City of Ferguson as important skills and abilities for candidates to possess and demonstrate. The starting salary is $120,000+ depending on the candidate's qualifications and experience. Residency in the City of Ferguson is required within a reasonable amount of time after appointment.

Desired Education, Skills and Abilities for the City Manager

Candidates must have a Bachelor's degree in public administration, business administration or public policy or a related field. A Master's degree (MPA or MBA) or other advanced degree is strongly desired. ICMA Credentialed Manager designation is a plus.

Candidates must have ten (10) increasingly responsible years of executive experience in an upper management position in an organization or community of comparable size and complexity to Ferguson.

Candidates must be strong communicators with a demonstrated record of communicating effectively with elected officials, keeping them apprised of issues and practicing a "no surprises" approach to working with the Mayor and City Council.

Candidates must have a proven record of collaborative community engagement working effectively with other community leaders, the business community and residents to move Ferguson forward. This will include working with the federal government, with advocacy organizations, with community organizations and with residents, businesses and employees; candidates must embrace and be excited about community involvement and community visibility.

Candidates must have a strong public sector financial background, with the ability to collaboratively craft and implement a financial plan for Ferguson that will provide for long-term sustainability.

Candidates must have effective organizational leadership skills with a reputation for communicating with employees at all levels of the organization, ensuring they feel valued while at the same time ensuring they are providing a high level of customer service; candidates must be strong listeners as well, willing to understand and assess the organization prior to making changes.

Candidates must have demonstrated experience as an advocate for their organization, with the ability and desire to represent Ferguson's interests at the county, state and federal level and ensure that Ferguson is "at the table" in key regional negotiations.

Candidates must be current on information technology and the use of social media, with the ability to be self sufficient in developing correspondence, responding to email and other typical office-related functions.

Desired Characteristics and Traits for the City Manager

Have a reputation for personal, professional and organizational integrity, leading an organization by example and conducting all personal and professional interactions fairly, honestly and ethically.

Candidates must have the maturity, self-confidence, and strength of professional convictions to provide administrative insights and administrative counsel to the Mayor, City Council and staff; be able to firmly and diplomatically present professional views and carry out administrative decisions in a timely, professional, and impartial manner.

Candidates must be articulate and be an effective communicator—both orally and in writing; someone who is comfortable listening to and talking with individuals from a wide variety of backgrounds and experiences.

Candidates must be able to create an environment dedicated to teamwork with other departments and where staff members are completely comfortable seeking out the City Manager to discuss potentially difficult situations or problems.

Candidates must be able to establish and maintain an effective working relationship with Federal, State and County agencies and other governmental units, using well-developed interpersonal skills, follow through, and a willingness to genuinely work together.

Candidates should be able to display a strong track record of effective customer-relation skills and abilities and be enthusiastic about participating and being active in community civic organizations.

Candidates must be a self starter and someone who is willing to listen to new ideas; be innovative and creative when addressing issues; anticipate trends and their effect on Ferguson.

CITY ORGANIZATION CHART

Citizens of Ferguson

City Council

Office of the City Clerk

Boards & Commissions

City Manager

City Attorney

Assistant to the City Manager

Economic Development
Human Resources
Information Technology
Public Relations

Director of Finance

Accounts Payable/Receivable
Business Licensing
Payroll

Director of Parks & Recreation

Parks Programming
Recreation Planning

Director of Planning/Development

Community Development
Planning
Zoning

Director of Public Safety

Fire Department
- EMT
- Fire Marshal

Police Department
- Administration
- Courts
- Field Operations
- Investigations
- Records

Director of Public Works

Administration
Code Enforcement
Municipal Services
- Park Maintenance
- Building/Streets Maintenance
- Vehicle Maintenance

GovHR USA
Voorhees Associates GovTempsUSA

GovHR USA
Voorhees Associates GovTempsUSA

Announces a Recruitment For

CITY ADMINISTRATOR

For THE CITY OF WILDWOOD, MISSOURI

GovHRUSA, LLC is pleased to announce the recruitment and selection process for the City of Wildwood, Missouri's next City Administrator. This brochure provides background information on the City of Wildwood, the municipal organization, and the community, and the qualifications and experiences the Mayor and City Council are seeking in the next City Administrator. The current City Administrator is retiring on September 26th after serving the City for 11 years. Candidates interested in applying for the position should submit their résumé and cover letter along with contact information for five work-related references by October 8, 2014 to Heidi Voorhees, at www.GovHRUSA.com/current-positions/recruitment.

Additional information about the City of Wildwood can be found on the City's website: www.cityofwildwood.com.

Heidi Voorhees, Co-Owner

GovHR USA/Voorhees Associates
650 Dundee Road, Suite 270
Northbrook, IL 60062
TEL: 847-380-3240
FAX: 866-401-3100
Formal applications should be submitted to:
www.govhrusa.com/current-positions/recruitment

WILDWOOD

PROFESSIONAL ANNOUNCEMENT

Wildwood, MO (35,517) is a unique, progressive community that is set in a magnificent natural environment that features heavily wooded, hilly terrain with valleys, meadows and streams. Located in St. Louis County, just a 20 minute drive from downtown St. Louis, Wildwood is an historic community dedicated to its Master Plan, which provides for the preservation of its rural areas while providing for residential and commercial growth. Of the 68 square miles within the municipal boundaries, 11 square miles are State or County Parks. The City is served by a AAA rated school system and has numerous recreational opportunities including an extensive trail and bikeway system, the only snow ski facility in the region and is an established equestrian community. The City was incorporated in 1995 and is dedicated to contracting out the majority of its municipal services. The City has 19 full-time employees, an annual operating budget of $8 million and a total annual budget of $17 million. Direct reports to the City Administrator include the Deputy Administrator/City Clerk, the Finance Officer, the Director of Planning and Parks, the Director of Public Works and the Municipal Court Clerk. The City is served by three separate Fire Protection Districts for Fire and EMS services and contracts with St. Louis County for police protection services. The City Administrator is appointed by a 16-member City Council with confirmation by the Mayor. There have been five City Administrators since the community's incorporation in 1995, with the most recent administrator retiring after 11 years as City Administrator. Candidates will be expected to have a strong background in financial management, economic development and contract management. It is critical that the Administrator fully embrace the city's adherence to its Master Plan and to the city's dedication to contractual service delivery. The position requires a bachelor's degree in public policy, public administration, planning, or a related field. A master's degree is strongly desired. Candidates must possess excellent interpersonal skills, an approachable, welcoming style with the community and staff, and a proven record in effective service delivery and creative problem solving. Strong writing skills, oral presentation skills, and a collaborative, team oriented management style are essential. Residency is required within 6 months of appointment. City contributes to an employee 401 plan in lieu of the state pension system. Starting Salary Range: $128,000 - $155,000 depending on qualifications and experience, plus an excellent benefits package. Candidates should apply by October 8, 2014 with résumé, cover letter, and contact information for five work-related references to Heidi Voorhees at www.GovHRUSA.com/current-positions/recruitment. Tel: 847-380-3243. Equal Opportunity Employer.

CITY HISTORY

Located in the western area of St. Louis County, Wildwood was incorporated in 1995. The City encompasses an area of over sixty-eight (68) square miles, making it the third largest municipality by area in Missouri. Wildwood is bisected by Missouri Highway 100, which runs east/west, and by Missouri Highway 109, which runs north/south. These roads provide access to major arterial and interstate highway systems in the St. Louis region, including Interstates 64 and 44.

By far, the most enduring and highly valued quality of Wildwood is its magnificent natural environment featuring heavily wooded, hilly terrain with valleys, meadows and streams. It makes for a magnificent setting and recreational resource that attracts residents and visitors alike. Within the City's boundaries are 11 square miles of state and county parkland including Babler State Park, Rockwoods Reservation and Range, and Greensfelder County Park. Shortly after incorporation, the City adopted a unique Master Plan intended to preserve these natural resources through various land use and development regulations. While most of the eastern one-third of the community is characterized by more conventional subur-

ban residential development, the rest of the community is zoned for non-urban development at one unit per three acres residential density. Additionally, business and higher density residential development is planned for the 800-acre Town Center area featuring neo-traditional style development including a business district intended to be the civic focal point of the community. The City recently constructed its new Municipal Building, housing City Hall and the St. Louis County Police Wildwood Precinct facilities in Town Center.

Wildwood has been fortunate to receive a number of accolades in its short history. *Money* magazine recognized Wildwood as one of its best places to live in 2003. In addition, Motovoto blog recognized the city as one of the best places to live in Missouri in 2014. Finally, NerdWallet Finance has twice proclaimed Wildwood as one of the "Best places for job seekers" and "Best cities for homeownership," in Missouri. Each award is a testament to the path that has been followed by the elected officials, members of city staff and most importantly by those that choose to call Wildwood "home."

Although Wildwood is a recently incorporated municipality, it has a rich history and is composed of several historic communities, some dating back to the early 1800s. The City is very proud of and highly values its history, with an Historic Preservation Commission that actively supports the history and historic vestiges of Wildwood.

Wildwood At A Glance

Population:	35,517
Land Area:	68 square miles) third largest in the state)
Miles of Streets:	300 (one half are privately owned)
County:	St. Louis
Median Home Value:	$351,800
Median Household Income:	$120,504
Households:	12,458
Bond Rating:	Aa-1 (Moody's)
Annual Budget:	$8 million operating and $9 million capital budget
Fiscal Year:	January 1
Number of full time employees:	19

THE CITY ORGANIZATION

The City of Wildwood is governed under a Home Rule City Charter by a Mayor, elected at-large for a four-(4) year term, and sixteen (16) City Council Members, two (2) from each of eight (8) wards, who are elected on a staggered basis for two-(2) year terms.

The City Administrator is appointed by the City Council with the approval of the Mayor for an indefinite period and serves as the chief administrative officer of the City. The City Clerk, City Attorney, Marshal, Treasurer, Prosecuting Attorney, and Municipal Judge are appointed by the Mayor with the approval of the City Council.

In accordance with its Charter mandate, principal public services are provided through a combination of contracted services with other public agencies, private contractors, and directly by independent public special purpose districts. As a result of this nontraditional manner of providing services, the City has very low "fixed" overhead costs. City Staff totals only nineteen (19) full-time employees, resulting in personnel costs, including salaries and all benefits, representing only 28.5% of the City's total operating budget. Municipal functions provided by full-time staff include general administration, financial management and accounting, municipal court administration, planning and land use regulation, code enforcement, park and recreation administration, recreation and special event programming, public works administration and overall management of contracted maintenance services.

Police services are provided under contract with the St. Louis County Police Department, which operates from a precinct facility located in the Wildwood Municipal Building. The City also contracts with St. Louis County for building permitting

and inspection services, public health services, and other functions. Public works maintenance functions, including roadway maintenance, street lighting, sidewalks, storm drainage, snow and ice control, traffic control and capital improvement construction are performed through contractual agreements with private construction firms selected annually through a competitive bidding process. Recreation programming, park site and recreational trail maintenance is likewise provided by contracted parties. Fire protection, emergency ambulance and fire prevention services are provided by three (3) independent fire protection districts covering portions of the City that are established as separate taxing authorities. Sanitary sewer services are provided generally in the eastern portion of the City by the St. Louis Metropolitan Sewer District, a regional public agency. Household solid waste, yard waste, and recycling services are provided under a franchise agreement by a private waste hauler. Electrical service is provided by Ameren Missouri, and natural gas is provided by Laclede Gas Company. Water service is provided by Missouri American Water Company.

Local Economy. The City continued to experience a stable local economy in recent years, reflecting national and St. Louis regional economic trends. Wildwood is regarded as one of the most desirable communities in the St. Louis area in which to live. New home construction totaled 73 new home permits for 2013, comparable to recent year's totals. New commercial construction was limited throughout all of 2013. On a positive note, there was limited vacant retail space for lease or purchase in the established business centers throughout the Town Center. Office space leasing remained strong, highlighted by a major new employer, Source HOV, leasing the space formerly occupied by City Hall.

As part of the metropolitan St. Louis area, the City of Wildwood is impacted financially more directly by the regional economy, particularly in the area of retail sales since the City benefits from the "pooled" distribution of sales tax revenues generated by a 1% St. Louis County-wide sales tax. Proceeds from this sales tax are distributed primarily on a per capita based formula. The regional retail economy was stable throughout 2013, and the City's allocation of sales taxes revenue grew moderately by almost 3.5% over 2012. That trend has continued for the first half of 2014. Also, since the City levies no local real estate taxes and derives only modest revenue from permits and development fees, the impact of the local housing market and changes in assessed value have little effect on the overall City finances.

Community Planning. Sound locally controlled community planning was the stimulus for incorporation of the City of Wildwood in 1995 and has been at the core of the City's governance during its nineteen (19) year history. The City's motto of "Planning Tomorrow Today" reflects this focus. In March 1996, the City Council adopted its original Master Plan to direct the City's future development. Wildwood's Master Plan is unique in that it is directly associated with the City Charter authority for its compliance. The City last conducted a comprehensive review and updating of the Master Plan during 2005 and 2006, a process which engaged the residents, business owners, property owners, and members of the public. In 2009 and 2010, a similar review of the more detailed Town Center Plan governing land use in the 800-acre core of the City was undertaken by the City under the oversight of a citizen's committee composed of residents and property owners, resulting in a recommended update of that plan.

Strategic Goals. The City of Wildwood has operated under a series of multi-year Strategic Goals since its incorporation. In May 2009, the City Council and Staff last participated in a facilitated community goal-setting process, resulting in the adoption of a new set of 5-Year Strategic Goals and Objectives intended to guide City policy and programs. These goals provided direction and fiscal discipline in the City's pursuits over the five-year term concluding in 2014. Noteworthy progress has occurred toward accomplishment of these strategic goals. The Strategic Goals are summarized as follows:

GOAL 1. Determine a Long-term Solution for City Hall and Police Facility Needs.

GOAL 2. Enhance Citizen Communications and Input.

GOAL 3. Maintain the Fiscally Responsible Financial Management that has been a Hallmark of Wildwood Government since Its Incorporation.

GOAL 4. Implement the Parks and Recreation "Action Plan" to Expand Recreation and Leisure Opportunities within the City.

GOAL 5. Promote and Facilitate Development of Town Center.

Recent Major Initiatives

- Construction of a new Wildwood Municipal Building containing City Hall and the Wildwood Precinct for the St. Louis County Police Department concluded in early 2013, and the building was occupied beginning February, 2013. Wildwood voters approved proceeding with the project in 2010 funded in part by the allocation of up to $5 million from General Fund Balance with the remaining $3 million obtained through capital lease debt (Certificates of Participation) which were issued in fall, 2010. This capital lease debt will be funded from existing City revenue over the 20-year debt amortization period.

- The City acquired a 63-acre parcel of property in early 2010 to serve as the site of a future Community Park. A comprehensive, citizen-engaged planning process for the future multi-phased development of the park was completed by Summer, 2011. The next major step in the park site planning process took place during 2012 with the engagement of a park planning consultant to prepare development plans to guide future budgeting of Community Park improvements in the years to come. The projected multi-million dollar overall cost of this facility is expected to represent a long-term financial commitment. It is anticipated that the first phase construction of the park site will begin during the latter part of 2014.

- Over the past two years, the City engaged in a multi-year effort to secure high speed internet service for the western portion of the community that is presently un-served or under-served due to the low population density and hilly, wooded terrain. The City had previously solicited proposals from internet providers and upon evaluation of responding companies, identified two (2) firms willing and capable of providing wireless internet service under public/private business partnership arrangements with the City. Under this arrangement, the City furnished and installed a number of utility poles and electrical service that the firms used to install internet transmission equipment under lease agreements with the City. The firms then offered their respective internet service to potential customers within the service areas of these pole locations. It is anticipated that these "networks" of wireless pole and repeater locations will be expanded during 2014 to provide service eventually to all of the un-served and under-served areas of Wildwood. The City Council has made providing contemporary high speed internet services to the un-served and under-served portions of Wildwood to be a principal City objective.

- The City of Wildwood and Missouri Department of Transportation undertook a joint project to design and construct major improvements to the section of State Highway 109 between Highway 100 and Clayton Road. These improvements will include additional lanes, a landscaped median, two (2) intersection traffic roundabouts, and extension of an intersecting street to access the new Community Park site. Construction design and preparation of construction plans took place during 2012 with construction bidding and work commencing in 2013. Of the projected $7 million overall cost for this project, the City's share is expected to be approximately $2.5 million.

- Several years ago, Wildwood joined with neighboring communities and the East-West Gateway COG planning agency in a "Great Streets" planning effort to revitalize and enhance the Manchester Road corridor generally east of Wildwood. This Manchester Road Great Streets Program resulted in three of the cities, including Wildwood, receiving a grant through the Missouri Department of Transportation for streetscape and other enhancements to the corridor to make it more attractive, safe and pedestrian friendly. Work on this project will begin this fall and run through next year.

CHALLENGES AND OPPORTUNITIES

The next City Administrator can expect to work with the Mayor and City Council as well as the senior staff on the following projects:

- Begin the update of the ten year Master Plan which is scheduled for completion in 2016. The City is also due to initiate a strategic planning process that will outline goals and objectives for the next 5 years. Within the next few years, the 10 year Town Center Plan update and the Review of the City Charter are also on the schedule.

- Wildwood, along with other St. Louis County communities, receives a "pooled" distribution from the St. Louis County 1% Sales Tax representing approximately 40% of the City's General Fund revenues. There have been repeated efforts within the legislature to substantially modify or eliminate the distribution formula that would have a significant negative financial impact on Wildwood as well as other County municipalities. The next City Administrator, together with City officials and officials from other municipalities, must be vigilant of such legislation, and also be prepared with a financial contingency plan for the City.

- Work with elected officials, staff and the business community to further economic development in the Town Center. The City Council has appointed an Economic Development Task Force that is planning to hire an economic development consultant to provide the city with advice on the current climate and potential opportunities for Wildwood.

- Collaborate with elected officials and staff to develop a multi-year plan for the construction and financing of the City's new Community Park.

CANDIDATE QUALIFICATION CRITERIA

The Mayor and City Council are seeking candidates who fully embrace Wildwood's fiscal conservatism and unique Master Plan. They are seeking candidates who are effective leaders and who are personable and approachable. The following education, experience, management, and leadership criteria have been identified by the City of Wildwood as important skills and abilities for candidates to possess and demonstrate. The starting salary range for the position is $128,000 -$155,000+/- depending upon qualifications and experience. Residency in the City of Wildwood is required within six months of appointment.

Education and Experience

A bachelor's degree is required. A focus in public administration, business administration, public policy, planning, or a related field would be advantageous. A Master's degree (MPA or MBA) or other advanced degree is strongly desired.

Candidates must have:

- A minimum of seven to ten years of progressively responsible experience in executive level administration of municipal services in a community or organization of comparable size and complexity.
- Strong contract management skills and be committed to Wildwood's approach to municipal service delivery.
- Courage of their convictions, able to present their best professional advice and counsel to the elected officials, being comfortable with the Council taking a different direction at times.
- Work effectively with a seasoned, self-directed staff, with the ability to delegate and fully utilize the staff's expertise while maintaining accountability for completion of city goals and objectives.
- A successful track record in securing grants and loans for infrastructure projects, understanding and developing relationships with granting agencies, intergovernmental organizations and other sources of funding to benefit the City of Wildwood.
- Strong financial management skills and expertise in budget development and administration.
- Be able to become completely familiar with the City's Master Plan and its application; a background in planning is a plus.

- Experience in the implementation of complex infrastructure improvements with the ability to adjust plans as needed depending on funding or other technical considerations; candidates must be able to coordinate capital financing with capital improvements.
- Be knowledgeable and current on methods for generating economic development including business attraction and retention, conservative yet creative financing options, and a dedication to the City being a welcome environment for business activity.

- A demonstrated record of success in collaborative leadership of direct reports and other senior staff, encouraging the staff to provide their best professional advice based on their respective areas of expertise as well as engage in creative problem solving, innovation and effective project management.

- A record of visibility and community involvement attending civic and community functions, interacting with business and community leaders and projecting a positive, approachable image of Wildwood municipal government.

Management and Leadership Style

Possess absolute integrity and honesty in all professional interactions.

Have the maturity, self-confidence, and strength of professional conviction to provide administrative insights and administrative counsel to the Mayor and City Council; be able to diplomatically present professional views and carry out administrative decisions in a timely, professional, and impartial manner.

Have a reputation for open and honest sharing of information with the Mayor and City Council.

Be a positive and enthusiastic individual who is genuinely supportive of the goals and mission of the City, developing a genuine affection for the community.

Possess a style based on confidence in oneself and in the employees that will quickly earn respect, trust, and credibility.

Be comfortable working as team with a small staff, fostering and encouraging camaraderie in the workplace; project a calm, professional demeanor.

Project a strong, professional, leadership and management presence. In addition, provide timely and straightforward feedback to employees regarding personal performance and achievement of assigned goals and objectives; be a good listener who treats employees fairly.

Be comfortable in serving a community that expects a high level of services and responsiveness on the part of municipal staff and employees.

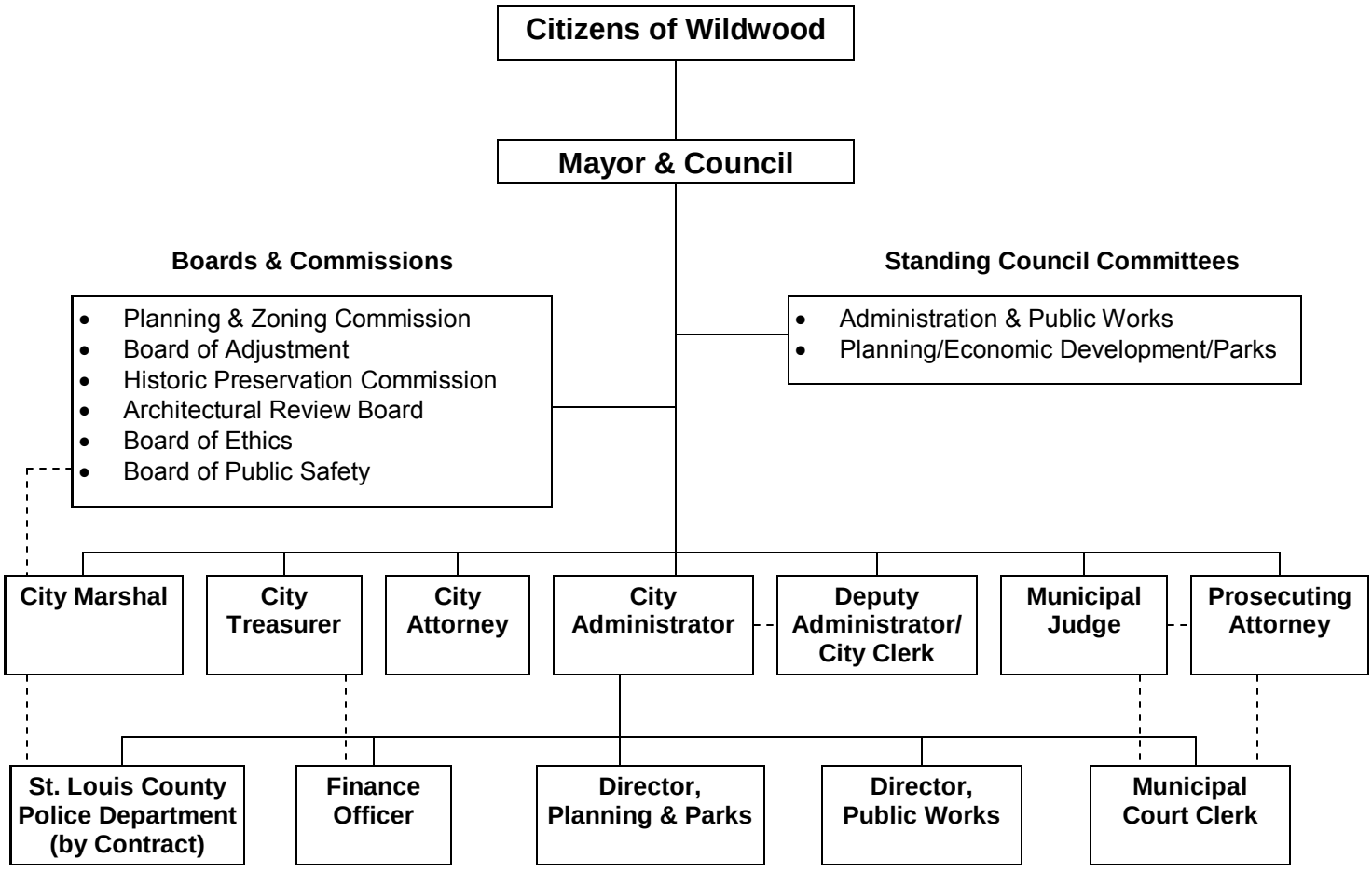
Follow a management style that involves a “no surprises” approach in presenting all the facts and alternatives to the Mayor and City Council.

Have the capability to provide strong, visible leadership by effectively articulating approved City plans, policies, programs, and activities with all governmental agencies, institutions, citizens, businesses, and press.

Be an effective listener, responsive to employee input and provide prompt and thorough feedback to employee comments and suggestions.

Possess strong interpersonal skills, with a demonstrated ability to work and interact openly and effectively with all. Be approachable and friendly in interactions with residents, businesses and employees.

City of Wildwood
ORGANIZATION CHART



Law Enforcement
Neighborhood Patrol
Traffic
Investigation

Accounting
Budgeting
Audit
Debt Management

Land Use/Zoning
Town Center
Code Enforcement
Parks Administration
Subdivision Administration
Permits and Inspections

Street and Bridge
Maintenance
Storm Drainage
Engineering
Permits and Inspections
Utility Coordination

Traffic Fines
Court Docket
Community Service

Proposal for Executive Search Services

City Administrator

City of Raytown, Missouri

May 2016

Strategic Government Resources

Ron Holifield, CEO
PO Box 1642
Keller, Texas 76244
214-676-1691
Ron@GovernmentResource.com

May 27, 2016

Ms. Debbie Duncan
Human Resources Manager
City of Raytown, Missouri
debrad@raytown.mo.us

Dear Ms. Duncan:

Thank you for the opportunity to submit this full service executive search proposal to assist the City of Raytown in your search for a new City Administrator.

SGR is one of the top three local government executive search firms in the nation and has the unique ability to provide a personalized and comprehensive search service to meet your needs.

I would like to draw your attention to a few key items that distinguish SGR from other search firms:

- SGR has over 75,000 email subscribers to my weekly "10 in 10 Update on Leadership and Innovation" e-newsletter.
- SGR will also send targeted emails to our database of over 4,500 city/county management officials.
- SGR's website, where this position would be posted, receives over 23,000 local government official visitors each month, with over 210,000 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 1,200 jobs listed at any given time.
- SGR is the only search firm with social media experts on staff, which provides a comprehensive social media marketing campaign that includes email, Facebook, Twitter, and LinkedIn.

The simple fact is that 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 doing this search for the City of Raytown. I look forward to discussing in more detail how we can help you select an exceptional City Administrator and am available to visit in person with you at your convenience.

Respectfully submitted,

Ron Holifield
Chief Executive Officer
Strategic Government Resources, Inc.
Ron@GovernmentResource.com
214-676-1691

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TAB 1

Company Contact Information

Contact Information for Binding Official / Primary Contact

Cyndy Brown, Managing Director of Recruitment & Administration
Strategic Government Resources

Address: P.O. Box 1642, Keller, TX 76244
Office: 817-337-8581
Fax: 817-796-1228
Email: CyndyBrown@GovernmentResource.com
Website: www.governmentresource.com

Alternate Contact

Ron Holifield, CEO
Strategic Government Resources

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 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 the Dallas/Fort Worth Metro area in Keller, Texas. SGR also has satellite offices in:

Arizona	**Texas**	**Florida**	**Louisiana**	**Oklahoma**
Gilbert	*Abilene*	*Kissimmee*	*Baton Rouge*	*Stillwater*
	Coppell	*Lakeland*		
	Dallas	*Sarasota*		
	Greenville			
	Lubbock			
	Murchison			
	New Braunfels			
	Seabrook			
	Sugar Land			

Executive Search Team
- Ron Holifield, Chief Executive Officer
- Cyndy Brown, Managing Director of Recruitment and Administration
- Melissa Valentine, Managing Director of Executive Search Operations and Human Resources
- Lori Philyaw, Managing Director of Interim Management Services and Executive Coaching
- Cindy Hanna, Executive Search Manager
- Katherine Lindley, Executive Search Manager
- Kristin Navarro, Executive Search Manager
- Abi Compton, Executive Search Coordinator
- Michelle Pelissero, Executive Search Coordinator

Executive Search Team (continued)

- Muriel Call, Research Coordinator
- Melissa Holguin, Assistant
- Sherry Green, Assistant
- Doug Thomas, Regional Director
- Bill Peterson, Senior Vice President, Executive Search
- Gary Holland, Senior Vice President, Executive Search
- Katie Corder, Senior Vice President, Executive Search
- Mark Boynton, Senior Vice President, Executive Search
- Marlin Price, Senior Vice President, Executive Search
- Mike Tanner, Senior Vice President, Executive Search
- Molly Deckert, Senior Vice President, Executive Search
- Ron Robinson, Senior Vice President, Executive Search
- Tommy Ingram, Senior Vice President, Executive Search

TAB 3

Unique Qualifications

Marketing and Networking

- SGR's 10 in 10 Update on Leadership and Innovation e-newsletter, where all executive searches conducted by SGR are announced, reaches over 75,000 subscribers.
- SGR has a database of over 4,500 city/county management professionals.
- SGR has formal collaborative partnerships with Maryland Municipal League, Ohio City/County Management Association, Missouri Municipal League, Oklahoma Municipal League, National Public Employers Labor Relations Association, Emerging Leaders in Local Government, City Management Association of Oklahoma, and Texas Fire Chiefs Association.
- 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 search group works as a team to leverage their networks to assist with each search. SGR team members are active on a national basis, in both local government organization 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 search 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 search 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 search 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 search 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 search 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 has never had a client embarrassed by surprises about a candidate. 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 search 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 search firm to use a licensed private investigation firm for these services.

Psychometric Assessments
SGR uses the DiSC Management 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. SGR also utilizes the I-OPT Assessment tool which measures how candidates perceive and process information. This information provides insight into what motivates a candidate, how a candidate may see an issue, and how a candidate interacts with others within a team.

Recruitment Videos
SGR offers the option of developing a custom video recruitment ad for posting on YouTube and linking to the video in other media sources. A sample SGR recruitment video for the City of Owasso, Oklahoma, can be viewed at http://bit.ly/OwassoOKCM.

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 search for your city. 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.

Five Way Guarantee
SGR provides the strongest guarantee in the industry.

1. Our price is our price. You will never be charged an additional fee because we need to come to another meeting or spend extra time.
2. You always have 24/7 cell phone and email access to the executive recruiter and SGR's CEO.
3. If you do not find the right candidate, we will start the process over with no additional professional fees.
4. If we place a candidate, that we have fully vetted through the SGR search process, who stays less than two years, we will conduct the search again with no additional professional fees.
5. If we place a candidate with you, we will not directly solicit them for another job.

TAB 4

Key Personnel for this Project

Mike Tanner, Senior Vice President
Mike Tanner became part of the SGR team in October 2013. He has 35 years of Texas municipal government experience. During 31 of those years, Mike served as the city manager of Portland, West University Place, Flower Mound, Universal City and Ingleside.

He is recognized for the practice of governance, strategic planning, growth management, organizational development and customer service.

Mike received his BA from the University of Texas in 1976 and his MPA from Southwest Texas State University in 1978.

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 in 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 high profile in the city management profession.

Ron holds a Bachelor of Arts in Government from Abilene Christian University and a Master's in Public Administration from Texas Tech University.

RESUME OF
MIKE TANNER

9007 Morningstar, Sugar Land, Texas 77479
(361) 813-3707
miketanner@governmentresource.com

CAREER SUMMARY

Thirty-five (35) years of municipal government service in Texas beginning in 1977 and ending with voluntary retirement on 7/23/13

Thirty-one (31) years of service as city manager:

- Portland 1/96 - 8/13 (Finest bedroom community in Texas Coastal Bend)
- West University Place 8/90 - 12/95 (Elite bedroom community with "country club" customer service located near Rice University and Houston Medical Center)
- Flower Mound 11/87 - 8/90 (Fastest growing city in southwestern U.S. at time, issuing up to 175 single-family building permits per month)
- Universal City 1/83 - 10/87 (Gateway to Randolph Air Force Base and bedroom community for military families, active duty as well as retired)
- Ingleside 12/78 - 6/80 (Workforce community serving adjacent petrochemical plants and offshore drilling)

Specialist in management of high quality, growth oriented suburb cities under 20,000 population

Recognized for practice of governance, strategic planning, growth management, economic development, organizational development and customer service

Never been terminated nor required to resign

DETAILED EXPERIENCE

- **City Manager - City of Portland:** Directed 155 employees (F/P/S) with $20,341,203.00 annual operating budget and $15,610,750.00 capital budget during final fiscal year. Major achievements follow:

  - Transformed under-performing municipality into model for small city government in South Texas (committed city council to "modified" Carver Policy Governance Model, choreographed meetings/workshops, reorganized advisory bodies, implemented continuous strategic planning process, utilized performance based budgeting, implemented comprehensive customer service program, adopted regulatory-compliant comprehensive plan, adopted economic development incentive guide, enacted unified development ordinance, implemented capital facilities plan, etc.).
  - Reorganized city government to increase efficiency and improve overall effectiveness (privatized sanitation services, privatized emergency medical services, privatized new construction plan review/inspections, privatized economic development services, replaced a

volunteer fire department with a professional fire department, expanded police department, created full-service park and recreation department, etc.)

- Employed 54 fewer full-time employees "on average" than comparable size Texas cities despite an expanded and high-quality service menu (direct and indirect savings during final fiscal year were estimated to be $4,072,525.00).
- Improved overall financial position (the city that wasn't sure it could afford to install basketball goals in the new Community Center gym in 1996, had reserves that totaled $9,365,961.00 during final fiscal year), gained GFOA recognition (budget and CAFR) and secured 5 separate bond rating upgrades.
- Directed or coordinated approximately $100,000,000,00 in capital improvements (City Hall, Police Station, Community Center, Fire Station No. 2, Public Works Center, Senior Services Center, Wastewater Treatment Plant, 4 water storage tanks, 2 water pump stations, 18 sanitary sewer lift stations, multiple sports complexes, 4 additional major parks, Aquatics Center, Festival Site, Skate Park, thoroughfare improvements, major drainage improvements, water line replacement, sanitary sewer line replacement, etc.).
- Successfully recruited major businesses (Super Wal-Mart, Academy Sports, Movie Theater, etc.) and played significant role in recruitment of nearby industry ($700,000,000.00 Voestalpine steel processing plant, $1,400,000,000.00 Tianjin Pipe Corporation-America steel pipe plant and $10,000,000,000.00 Chenier liquefaction plant).
- Effectively mitigated 1,500 to 2,000 population decrease when Naval Station Ingleside closed (Redeployment began in 2009 and was completed in 2010).

- **City Manager - City of West University Place:** Directed 150 employees (F/P/S) with $12,704,180.00 annual operating budget. Major achievements follow:

  - Reorganized city government to increase efficiency and improve overall effectiveness (closed sanitary landfill, modified sanitation services, privatized park/grounds maintenance, privatized facility maintenance, etc.)
  - Improved overall financial position and secured 2 bond rating upgrades
  - Developed and implemented Comprehensive Municipal Facility Improvement Plan as well as Comprehensive Park Development Plan
  - Developed and implemented $86,000,000.00 "High Impact" Infrastructure Replacement Program (every street, water line and sewer line in "West U" has since been replaced)
  - Directed $20,000,000.00 in miscellaneous capital improvements (street, drainage, sanitary sewer, water, public works center, park and recreation facility projects)
  - Directed city charter review and amendment
  - Converted sanitary landfill to "pay to play" golf course

- **Town Manager - Town of Flower Mound:** Directed 111 employees (F/P) with $9,200,000.00 annual operating budget. Major achievements follow:

  - Reorganized town government to accommodate unprecedented growth (20 to 25% annual), increase efficiency and improve overall effectiveness
  - Increased General Fund Reserve from $256,799.00 to $1,400,000 in one year and secured a bond rating upgrade following Wall Street/rating agency presentations. Secured one additional bond rating upgrade later.
  - Successfully negotiated major developments and mediated disputes in transition areas

- Expedited Farm to Market Roads 1171 and 2499 (financed TxDOT engineering costs, secured additional rights-of-way and negotiated necessary zoning changes)
- Directed $10,000,000.00 in capital improvements (Wastewater Treatment Plant expansion and street improvements)

- **City Manager - City of Universal City:** Directed 95 employees (F) with $4,800,000 annual operating budget. Major achievements follow:

  - Reorganized city government to increase efficiency, improve effectiveness and overall financial position
  - Directed construction of new Municipal Building, Central Fire Station, Public Works Center improvements and Animal Shelter without raising ad valorem tax rate, utility rates or fees
  - Enacted comprehensive zoning ordinance that promoted negotiated land use and development
  - Promoted Universal City industrial sites in Los Angeles Metro Area and San Francisco Bay Area

- **Director of Planning and Community Development - City of Kingsville:** Directed multiple departments (Planning, Building and Community Development), activities and special projects. Major achievements follow:

  - Improved image and customer service of departments
  - Developed, implemented and administered new Subdivision Ordinance
  - Wrote or administered Coastal Environmental Impact Program, Main Street U.S.A. and Urban Development Action grants
  - Coordinated Hurricane Allen debris removal
  - Coordinated downtown holiday decoration

- **City Manager - City of Ingleside:** Directed 60 employees (F/P) with $2,041,000.00 annual operating budget. Major achievements follow:

  - Directed home-rule process that established council-manager form of government (first city administrator and city manager)
  - Reorganized city government to increase efficiency, improve effectiveness and overall financial position
  - Developed as well as implemented new subdivision ordinance, zoning ordinance and building codes
  - Promoted industrial development of Intercoastal Waterway sites via the construction of water lines and storage
  - Constructed first city swimming pool

EDUCATION, TRAINING AND AFFILIATION

- **Undergraduate Degree:** BA - University of Texas 1976 (Government Major, Business Minor)
  Graduate Degree: MPA - Southwest Texas State University 1978 (Planning Concentration)

- **Supplemental Instruction and Training of Note:**
  - Visionary Leadership - Public Executive Institute (TML and LBJ School/University of Texas)

- Mediation - Center for Public Policy Dispute Resolution (University of Texas School of Law)
- Emergency Management - Texas Department of Public Safety
- Law Enforcement - Del Mar Regional Police Academy

- **Affiliation and Membership:**
  - Texas City Management Association : Full Member (former member of Board of Directors, former Chairman of Member/Public Relations Committee, former Vice-Chairman of Ethics Committee, former Regional President, statewide mentor of new city managers and former statewide speaker: strategic planning and performance measurement

TAB 5

Project Methodology

SGR provides a comprehensive scope of executive search services, and each executive search service contract is tailored to meet the client's specific needs. However, a full service executive search 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
    - Recruitment Video (optional)
    - 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 Select Finalists

5. **Evaluation of Finalist Candidates**
    - Comprehensive Media Search Stage 2
    - Comprehensive Background Investigation Report
    - DiSC Management Assessment
    - I-OPT Assessment (if desired)
    - 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 search 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 search. 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 search, 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 75,000 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, and LinkedIn 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.

Recruitment Video

SGR offers the option of developing a custom video recruitment ad, which can be posted on YouTube and linked to other media sources. It is estimated that job postings with video icons are viewed 12 percent more than traditional job postings, and that the job application rate increases by an average of 34 percent when video is added. A sample SGR recruitment video for the City of Owasso, Oklahoma, can be viewed at: http://bit.ly/OwassoOKCM.

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 provide 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 search 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 search 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 with the semifinalist briefing book 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 search 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

- 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)
- County civil search (for every county in which the candidate has lived or worked)
- Education verification

A sample Background Investigation Report is included with this proposal document.

Assessments (DiSC and I-OPT)

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.

The I-OPT Assessment is a tool that measure how a person perceives and processes information. How someone perceives and processes information has a profound impact on what motivates a person, how a person sees an issue, and how that person interacts with others on team projects. Understanding one's own I-OPT Profile makes it possible to be more self-aware. Understanding another's I-OPT Profile helps predict how he or she will approach any given situation. (In a City Manager search, this will include I-OPT reports of the finalist candidates, direct reports, and city council. In department head searches, this will include I-OPT reports of the finalist candidates, City Manager, Assistant City Manager, peer department heads, and direct reports.)

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 search;
- Holding a public forum for citizen engagement at the outset of the search;
- 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;
- 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)

"First Year Game Plan" process where finalist candidates are provided with elected official, key staff, and community leader contact information, and the 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

At this meeting, SGR will facilitate a discussion about the finalist interviews and assist the Search Committee in making a decision 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. 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 search 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 Search)

Task	Weeks
• Contract Executed • Outline Project Plan, Timeline • Individual Interviews with Search Committee/Key Personnel/ Community Leaders (if desired)	Weeks 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 • Candidates Complete I-OPT 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 search 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 searches well beyond 15 weeks, based on the preference of the client.

TAB 7

Project Cost

All-Inclusive Maximum Price

Professional Services Fee:	$ 18,500
Expenses Not-to-Exceed:	$ 8,500
All-Inclusive, Not-to-Exceed Maximum Price:	**$ 27,000***

Expense Items (*Included in Not-to-Exceed Price Above*)

SGR considers incidentals to be covered by the professional services fee, and we do not bill the client for any expenses except for those explicitly detailed herein.
Expense items include:

- Professional production of a high quality brochure. This brochure (typically 3-4 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.
- Printing of documents and materials. Reproduction costs for reports and briefing books presented to the client at 23 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. There is a cost of $150 per candidate for the I-OPT Assessment as well (up to 6 finalists).
- Comprehensive Media Reports – Stage 2. There is a cost of $350 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 and related costs for the Project Manager incurred for the benefit of the client. Meals are billed back 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.

*Supplemental Services

The supplemental services listed below are **not** included in the maximum price above. These 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.
- Recruitment video. SGR offers the option of a customized recruitment video for a cost of $5,000.
- 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 search 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 Project Manager 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 search are billed in three equal installments during the course of the search. 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 search. 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 search 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 has been fully vetted through the SGR search process) who resigns or is released within 24 months of their hire date, SGR will repeat the process at no additional professional fee to the client. We also guarantee that we will not directly solicit a candidate we bring to you for another job.

TAB 9

References

Jon Amundson, Assistant City Manager
City of Richland, Washington (pop. 47,000)
Email: jamundson@ci.richland.wa.us
Phone: 509-942-7380

Lynn Barboza, Human Resources Manager
City of Las Vegas, Nevada (pop. 567,000)
Email: lbarboza@lasvegasnevada.gov
Phone: 702-229-4879

Matt Mueller, Town Manager
Town of Little Elm, Texas (pop. 5,100)
Email: mmueller@littleelm.org
Phone: 214-975-0405

Tom Hayden, Mayor
Town of Flower Mound, Texas (pop. 67,000)
Email: mayor@flower-mound.com
Phone: 214-384-1105

Randy Rhoads, Mayor
City of Lee's Summit, Missouri (pop. 92,000)
Email: randy.rhoads@cityofls.net
Phone: 816-969-1030

Alan Guard, City Manager
City of Chickasha, Oklahoma (pop. 17,000)
Email: aguard@chickasha.org
Phone: 405-222-6045

Tim Pogue, Mayor
Haley Morrison, HR Director
City of Ballwin, Missouri (pop. 30,000)
Email: tpogue@ballwin.mo.us
Email: hmorrison@ballwin.mo.us
Phone: 636-207-2332

TAB 10

Recent City Management Executive Searches

2016

City/Town Manager

- Amarillo, Texas (pop. 189,000) – in process
- Angleton, Texas (pop. 19,000) – in process
- Bethany, Oklahoma (pop. 19,000) – in process
- Clarksville, Indiana (pop. 22,000) – in process
- Davenport, Iowa (pop. 101,000) – in process
- Des Moines, Washington (pop. 29,000) – in process
- Elgin, Texas (pop. 10,000) – in process
- Gunnison, Colorado (pop. 5,500) – in process
- Lake Dallas, Texas (pop. 8,000) – in process
- Palm Beach Shores, Florida (pop. 1,500)*
- Sweetwater, Texas (pop. 10,000) – in process
- Valley Center, Kansas (pop. 5,000) – in process
- Williston, North Dakota (pop. 13,000) – in process

2015

City/Town Manager

- 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)
- Bedford, Texas (pop. 49,000)
- Bridgeport, Texas (pop. 6,000)
- Casper, Wyoming (pop. 53,500)
- Forney, Texas (pop. 16,000) – in process
- 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) – in process
- Northglenn, Colorado (pop. 34,000)
- Port Lavaca, Texas (pop. 11,000)
- Sealy, Texas (pop. 6,000)
- St. Charles, Missouri (pop. 65,000)
- Stillwater, Oklahoma (pop. 46,000)

Deputy/Assistant City Manager

- Bellevue, Washington, DCM (126,600)
- Fort Worth, Texas, ACM (pop. 790,000)
- Georgetown, Texas, ACM (50,000)
- Waco, Texas, ACM (pop. 129,000)

2014

City/Town Manager

- 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 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

- 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 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)*

2012

City Manager

- Argyle, Texas (pop. 3,500)
- Bainbridge Island, Washington (pop. 23,000)
- Breckenridge, Texas (pop. 5,500)
- Burkburnett, Texas (pop. 11,000)
- Canton, Texas (pop. 3,500)
- Cleveland, Texas (pop. 7,600)
- Duncanville, Texas (pop. 39,000)
- Elk City, Oklahoma (pop. 12,000)
- Fate, Texas (pop. 7,500)
- Flower Mound, Texas (pop. 67,500)
- Guthrie, Oklahoma (pop. 10,500)*
- Hot Springs, Arkansas (pop. 35,000)
- Huntsville, Texas (pop. 39,500)
- Jacksboro, Texas (pop. 4,000)
- La Porte, Texas (pop. 34,500)
- Little Elm, Texas (pop. 28,500)
- Miami, Oklahoma (pop. 13,500)
- Paris, Texas (pop. 25,000)
- Piney Point Village, Texas (pop. 3,200)*
- Rockwall, Texas (pop. 39,000)
- San Angelo, Texas (pop. 95,500)
- Texarkana, Texas (pop. 37,000)
- Van Alstyne, Texas (pop. 3,000)
- Willow Park, Texas (pop. 4,000)

Deputy/Assistant City Manager

- Brentwood, Tennessee, ACM (pop. 39,000)*
- Cedar Park, Texas, ACM (pop. 58,000)
- Corpus Christi, Texas, ACM (pop. 312,000)
- Victoria, Texas, ACM (pop. 64,000)*

2011

City Manager

- Breckenridge, Texas (pop. 5,500)
- College Station, Texas (pop. 98,000)*
- Gonzales, Texas (pop. 7,000)
- Kilgore, Texas (pop. 13,500)
- Van Alstyne, Texas (pop. 3,000)
- Yoakum, Texas (pop. 5,500)

2010

City Manager

- Amarillo, Texas (pop. 195,000)
- Burkburnett, Texas (pop. 10,500)
- Denison, Texas (pop. 23,000)

Deputy/Assistant City Manager

- Midland, Texas, ACM (pop. 119,000)*

*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

Executive Search Clients

Abilene, Texas
Addison, Texas
Alamo Heights, Texas
Alice, Texas
Allen, Texas
Altus, Oklahoma
Alvin, Texas
Amarillo, Texas
Anna, Texas
Arcadia, Florida
Argyle, Texas
Arlington, Texas
Atlanta, Texas
Azle, Texas
Bainbridge Island, Washington
Ballwin, Missouri
Baytown, Texas
Bedford, Texas
Bellaire, Texas
Bellevue, Washington
Big Spring, Texas
Breckenridge, Texas
Brentwood, Tennessee
Bridgeport, Texas
Burkburnett, Texas
Burleson, Texas
Burien, Washington
Burnet, Texas
Canton, Texas
Cape Girardeau, Missouri
Casper, Wyoming
Cedar Hill, Texas
Cedar Park, Texas
Chapel Hill, Tennessee
Chickasha, Oklahoma
Cleveland, Texas
College Station, Texas
Colleyville, Texas
Colorado River Municipal Water District, Texas
Commerce, Texas
Converse, Texas
Copper Canyon, Texas
Corpus Christi, Texas
Dalhart, Texas
Dalworthington Gardens, Texas
Delray Beach, Florida
Denison, Texas
Denton, Texas
Denton County Fresh Water Supply District 1-A, Texas
Duncanville, Texas
El Paso, Texas
El Paso MPO, Texas
Elk City, Oklahoma
Fairview, Texas
Farmers Branch, Texas
Farmersville, Texas
Farmington, New Mexico
Fate, Texas
Ferris, Texas
Flower Mound, Texas
Forney, Texas
Fort Worth, Texas
Freeport, Texas
Friendswood, Texas
Gainesville, Texas
Galveston, Texas
Georgetown, Texas
Gonzales, Texas
Granbury, Texas
Grand Prairie, Texas
Grapevine, Texas
Greenville, Texas
Guthrie, Oklahoma
Hallandale Beach, Florida
Hancock County Port & Harbor Commission, Mississippi
Harris County ESD No. 48, Texas
Henderson, Texas
Hewitt, Texas
Highland Park, Texas
Hot Springs, Arkansas
Hudson Oaks, Texas
Huntsville, Texas
Hutchinson, Kansas
Hutto EDC, Texas
Irving, Texas
Jacksboro, Texas
Jacksonville Development Corporation (JEDCO), Texas
Joshua, Texas
Kalamazoo County Consolidated Dispatch Authority (KCCDA), Michigan
Kaufman, Texas
Keller, Texas
Kilgore, Texas
Kyle, Texas
La Porte, Texas
Lakeland, Florida
Lakeway, Texas
Lamesa, Texas
Lancaster, Texas
Las Vegas, Nevada

Executive Search Clients

Lawton, Oklahoma
League City, Texas
Leander, Texas
Lee County, Florida
Lenexa, Kansas
Levelland, Texas
Lewisville, Texas
Lindale, Texas
Little Elm, Texas
Longview, Texas
Lorena, Texas
Los Lunas, New Mexico
Lufkin, Texas
Manhattan, Kansas
McKinney, Texas
McKinney EDC, Texas
Memorial Villages PD, Texas
Miami, Oklahoma
Midland, Texas
Midlothian, Texas EDC
Missouri City, Texas
Montgomery, Texas
Mount Pleasant, Tennessee
Mount Pleasant, Texas
Mustang, Oklahoma
Nolensville, Tennessee
North East Texas Regional Mobility Authority (NET RMA), Texas
Northglenn, Colorado
North Richland Hills, Texas
North Texas Emergency Communications Center (NTECC), Texas
Orange County, North Carolina
Overland Park, Kansas
Owasso, Oklahoma
Palestine, Texas
Palm Beach Shores, Florida
Paris, Texas
Pearland, Texas
Piney Point Village, Texas
Plainview, Texas
Plano, Texas
Port Arthur, Texas
Port Lavaca, Texas
Port Neches, Texas
Prosper, Texas
Red Oak, Texas
Richardson, Texas
Richland, Washington
Richland Hills, Texas
Riverbend Water District, Texas
Rockwall, Texas
Round Rock, Texas
Rowlett, Texas
Royse City, Texas
Sachse, Texas
San Angelo, Texas
San Marcos/Hays County EMS, Texas
San Marcos, Texas
Seabrook, Texas
Seagoville, Texas
Sealy, Texas
Shoreline, Washington
Shreveport, Louisiana
Sikeston, Missouri
Socorro, Texas
Southlake, Texas
South Padre Island, Texas
St. Charles, Missouri
Stephenville, Texas
Stillwater, Oklahoma
Sugar Land, Texas
Sunny Isles Beach, Florida
Temple, Texas
Terrell, Texas
Texarkana, Texas
TexAmericas Center, Texas
Thompson's Station, Tennessee
Tomball, Texas
Trinidad, Colorado
Trophy Club, Texas
Tyler, Texas
Van Alstyne, Texas
Victoria, Texas
Waco, Texas
Washoe County, Nevada
Waxahachie, Texas
Weatherford, Texas
Westlake, Texas
West Lake Hills, Texas
Westworth Village, Texas
Wheat Ridge, Colorado
Willow Park, Texas
Wills Point, Texas
Yoakum, Texas

Executive Search Recruited Positions

Administration
Assistant City Manager
Assistant County Manager
City Manager/City Administrator
City Secretary
Deputy City Manager
Director of Administration
Executive Director (Regional Mobility Authority)

Administrative Services/Internal Services
Administrative Services Director
Arts Director
Assistant Municipal Garage Superintendent
Chief Performance Officer
Director of Human Resources & Risk Management
Director of Operations and Maintenance
Facilities Services Manager
Fixed-Base Operator Services
Fleet Equipment Services Manager
Human Resources/Civil Services Director
Intergovernmental Services Manager
Management Assistant
Manager of Town Services

Animal Services/Environmental Health
Animal Services Manager
Animal Shelter Manager
Animal Welfare Director
Animal Welfare Manager
Assistant Director of Code Compliance/Animal Welfare
Chief Medical Examiner
Director of Regional Animal Services
Environmental Health Director
Executive Director of Animal Services

Development Services
Assistant Property Management Director
Building Official
Chief Building Official
City Inspector
Community Development Director/Manager
Community Services Administrator
Deputy Director of Development Services
Development Services Director
Municipal Services Director
Neighborhood Services Director
New Urbanist
Planning & Community Development Director
Property Management Director
Senior Building Inspector/Building Inspector
Tourism and Community Development Director

Economic Development, CVB
Assistant Economic Development Director
CVB Executive Director
Director of the Office of ED (County)
Downtown Development Director
Economic Development Corporation President/CEO
Economic Development Director/Executive Director
Executive Director of Port & Harbor Commission
Vice President/Chief Econ Development Officer

Finance
Accounting Services Supervisor
Assistant Director of Finance
Assistant Director of Finance - Treasury
Budget Officer
Budget Manager
Capital Projects Budget Manager
Chief Financial Officer
Deputy Director of Finance
Finance Controller/Auditor/Comptroller
Finance Director
Finance Manager
Senior Accountant
Senior Budget Analyst
Treasury Supervisor

Information Technology
Chief Technology Officer/Chief Information Officer
IT Assistant Director
IT Developer
IT Director
IT Manager
IT Manager (Police Department)
GIS Manager
Senior Software Developer

Executive Search Recruited Positions

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 Director
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
Parks and Recreation Director
Park Superintendent
Program Area Manager (Parks)
Recreation Superintendent

Public Safety/EMS/Emergency Management
Assistant Fire Chief
Assistant Police Chief
Chief of Public Safety
Emergency Management Coordinator
EMS Executive Director
Executive Director
Fire Chief
Lieutenant
Police Chief

Public Works/Utilities/ Engineering
Assistant City Engineer
Assistant General Manager for Water District
Assistant Utilities Director
Chief Plant Operator
City Engineer
City Planner
Deputy Director of Utilities
Director of Engineering & Environmental Services
Director of Projects & Engineering
Director of Public Services
Director of Utilities
Engineering Project Manager
Engineering Services Manager for Water District
Planning & Engineering Director
Planning Manager
Public Works Assistant Director
Public Works Director
Water District Executive Director
Water District General 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 2015: "SGR really is a class act and I appreciate the personal nature of your communications – you must have an excellent staff. I have been through more than a few applications while transitioning from the military, and I will tell you that your company stands at the top."

November 2015: "I sincerely believe your personal courtesy and agency is the most professional of any I have ever experienced."

October 2015: "One of the reasons I enjoy working with your firm is you still have the old fashion courtesy of keeping candidates updated. It is really appreciate, whether we are the successful one(s) or not."

July 2015: "You have been 'top notch' in your communication and willingness to share resources."

June 2015: "Please allow me to tell you how very much I appreciate your kind and thoughtful e-mail. Civility and class never go out of style."

April 2015: "I'm very impressed with how well SGR works on recruitment. I really appreciated all of the follow-up emails and how much communication you provide. Should any city I work for in the future seek an executive recruitment, I would not hesitate to recommend SGR."

April 2015: "This is the most informative and personable search communication that I've ever received from an executive search firm. Kudos to you! I've been receiving the notification updates."

March 2015: "Thanks, [Executive Recruiter]. You and [SGR staff] made it an enjoyable experience and I am very pleased with the results. I hope we don't need your services anytime soon, but if we do, I will call you first.]

November 2014: "It was a pleasure working with you and your team, [Executive Recruiter]. SGR is a great organization and I'm very proud to work with you all!"

October 2014: "Fantastic, you are making this whole process easy, informative and pleasant. Thank you for your attention and patience."

August 2014: "Amazing customer service. It is so obvious that your whole team really cares and is very passionate about what they do. It is the best I have ever experienced."

August 2014: "My experience during this process has been excellent. It can be unnerving to be on this side of the recruitment. You and your team have provided excellent communications and updates. Your efforts are greatly appreciated. I am very pleased to continue in the process."

August 2014: "Thanks so much for the quick response. I just have to ask - do you folks work 24/7? I get emails from you, [SGR staff] and Ron on the weekends, late at night, early in the morning. I must say, I've been in local government a long time and have never experienced a firm as responsive, prompt, courteous, and informative you all at SGR. You guys are fantastic!"

July 2014: "Not the news I was hoping for, but I'm glad you have such a great field of candidates. Once again, from my experience, you and your team execute the most professional search!"

July 2014: "I was very impressed with our meeting and I feel like you were really listening to all the concerns and suggestions of the committee. Thank you very much for keeping me posted and I look forward to hearing from you soon."

July 2014: "I just want to thank you for the work that [Executive Recruiter] and SGR did on our recent Fire Chief search. Once again, you guys knocked it out of the park. [Executive Recruiter] was extremely accommodating, extremely accessible and extremely patient. He even indulged me when I asked tons of questions. You both are such great guys. I feel privileged to work with you guys and consider you friends. Thanks again."

July 2014: "I just wanted to take a moment and validate what I am sure you already know…your staff is top shelf! I recently went through the [city] [position] search with your company and everybody that I worked with at SGR was stellar; it was a pleasure working with each of them. [SGR staff] and especially [Executive Recruiter] were true professionals and kept me abreast of the process every step of the way with no surprises. It speaks volumes about SGR that you can attract and retain such quality individuals."

June 2014: "The selection process has ended for me as the [city] has gone with another candidate but I wanted to express my thanks to you for the assistance you provided me during my preparation. The information you provided was valuable and assisted me greatly. Thank you again, and I wish you and SGR all the best in the future."

June 2014: "I can already tell the SGR executive recruitment process is quite an experience. You and your team do a great job and I have no doubt you drive additional business through your courtesy and responsiveness to candidates. In short, extremely well done!"

June 2014: "Thanks for keeping us all updated...it speaks volumes for SGR's corporate culture and your personal integrity. I know that you know full well what we go thru. You guys are awesome and no matter the outcome of this process I will chalk it up to another positive experience with working with SGR."

May 2014: "We really appreciate all your help. Note: every candidate complimented [Executive Recruiter] and SGR!"

April 2014: "My compliments again to SGR and the [city] on a well-organized, innovative, and highly responsive recruitment process."

March 2014: "I really appreciate all your help from start to finish in our search for a new city manager. I will definitely call you the next time we have an opening we need help filling. There is no doubt we, as a city, made the right decision to select SGR to bring us quality candidates."

March 2014: "Just a brief note to thank you both, and particularly [Executive Recruiter], for the professional and thorough search effort. Our final selection of [candidate] received unanimous support. This result speaks to the merits of the SGR process in recruiting and selecting the kind of top talent we were after."

October 2013: "I cannot begin to thank [SGR] enough for the services that were provided. SGR did an incredible job with this search. It ran very smoothly and efficiently. I cannot think of one thing that could be improved. Thank you so much!"

October 2013: "Just a short note to thank you for the multiple communications regarding your search. You folks are a class act as one rarely hears a thing from a search these days."

September 2013: "Thank you so much for a superb effort in assisting us in a search for [position]. … I would recommend SGR to anyone. Your process is one that is highly likely to lead to success, certainly more so than a typical head-hunting outfit."

September 2013: "This was without a doubt as professional as I have seen. You did an amazing job. I look forward to working with you in the future. Thank again."

July 2013: "Just a brief note to say thank-you for considering me for [position]. While I am obviously disappointed in the final outcome, I cannot help but view the overall experience positively…I would also like to thank you for your professionalism through the process. You are a credit to your firm, and do all of us who serve the public a great service."

July 2013: "On behalf of [Department Head] and our entire HR team, I just want to thank you and your team members for making this search such a smooth and easy process for us."

June 2013: "I want you to know that [Executive Recruiter] did a fantastic job for us. He got us an outstanding list of applicants, made excellent recommendations regarding who we should be considering, and it was just a really terrific effort on SGR's part all the way around. [SGR staff] was most helpful during the posting process and wonderful to deal with over the phone. Your company added tremendous value to the process."

May 2013: "THANK YOU FOR ALL YOUR ASSISTANCE! What an AMAZING team at SGR… I'm loving this experience working with you all."

April 2013: "It has been a pleasure being considered for the position [with client]. Although not chosen for the position, I feel I am better prepared for future interviews (live or recorded) due to my interaction with Strategic Government Resources. The level of professionalism shown by your entire staff at SGR has been exemplary. Throughout the entire process phone messages and emails were returned promptly, enabling me to become more prepared for the interview

process. If I can be of any assistance to you in the future, please do not hesitate to call upon me."

February 2013: "[Executive Recruiter] and SGR deserve significant credit for not only helping us find the best fit for our community but moreover for being an integral component in ensuring the [client] has vital human resources necessary to meet [department] challenges ahead and excel beyond the goals set before us. For your guidance and expertise, we are truly appreciative."

January 2013: "Thank you. The fact that you have continually taken the initiative to keep me up to date speaks volumes to your ethics and professionalism. Quite honestly, both of these qualities have become less evident in the field."

December 2012: "Your firm and employees have a level of caring and customer service our organization aspires to. You have made excellence of product and service the standard for your firm. You guys are one of very few firms (maybe the only one I know of) that has made superior customer service its everyday standard to the point where even great customer service would be a letdown."

September 2012: "I have really enjoyed being able to participate in the recruitment process to date. I was especially intrigued with the use of online interview technology…I also really like the way you've organized the First Year Game Plan exercise. It's a really neat way for the candidates, city staff and council members to get to know one another better before the formal interviews take place."

September 2012: "Like many in the city manager profession, I have experienced and participated in a number of different search processes as a candidate as well as employer. The search process for the [client] City Manager position was my first experience with a search conducted by SGR. Without question, your process was the most thorough search I have experienced in 25 years and dozens of searches. As a candidate, I felt the process challenged me to be extremely well-informed about the position and the community. In addition, all SGR representatives provided me with accurate, timely and complete information throughout the search process. Congratulations and thank you!"

June 2012: "Again, I want to THANK YOU and your staff I have had the pleasure to work with. There definitely is a reason you are swamped with searches. The "Golden Rule" is serving SGR well. Please know that [staff members] have all been great and they have certainly helped me through this transition."

TAB 12

CITY OF BALLWIN, MISSOURI
City Administrator Position Profile

THE COMMUNITY

Located in the heart of prestigious West St. Louis County, Ballwin, Missouri is a dynamic community of more than 30,000 residents. Covering 10 square miles, the city is ideally situated in the St. Louis Metro area with easy access to Interstates 270, 64, and 44. Ballwin is the fifth largest city in St. Louis County which has a population of more than 1 million people. Ballwin is located 30 minutes from the St .Louis–Lambert International Airport and only 40 minutes from downtown St. Louis.

Ballwin was founded in 1800 by John and Mary Bray Ball. The town's original name was Ballshow and was changed to Ballwin in 1837. Ballwin grew from a small town with few homes and businesses to a small village of 750 people when it was incorporated on December 29, 1950 as a City of the Fourth Class under Missouri Law.

Named as **"One of the Best Places to Live" by *Money Magazine*** in 2005, 2011, and again in 2013, Ballwin prides itself on the wide range of programs and services available to its residents. Consistently recognized as one of the safest and best places to raise a family, Ballwin was designated **"2nd Safest City in Missouri"** and "9th Safest City in the US" by Neighborhood Scout. In 2012, Ballwin was named by both *Businessweek* and *Family Circle* magazines as a **"Top City for Family"** and one of the "Best 10 Towns for Families" respectively. In 2014 Ballwin was recognized as the #7 **Top Small City in Missouri** by Cities-Journal.com.

Ballwin offers a wide range of quality of life amenities. Two state-of-the-art recreational facilities, The Pointe at Ballwin Commons Community Center and North Pointe Family Aquatic Center, provide exceptional opportunities for family fun, leisure time, and personal fitness. Ballwin's municipal golf course is recognized as the best public nine-hole facility in the area and was acclaimed with the prestigious *"Editor's Choice Award" by St. Louis magazine* as "Best Quality Golf."

Beautiful Vlasis Park is the crown jewel of the City's parks system and covers 31 acres featuring baseball diamonds, tennis courts, ponds, a pavilion, volleyball courts, and an array of outdoor and recreational elements. The park is home to the annual Ballwin Days festival featuring activities for the entire family including a parade, carnival rides, fireworks, live entertainment, and the Ballwin Days 5K and 1 Mile Run.

Residents and visitors enjoy easy access to various professional sports teams including the St. Louis Cardinals, the St. Louis Blues, and the St. Louis Rams. With Castlewood State Park and Meramac River nearby, there are ample opportunities for a variety of outdoor adventures.

BALLWIN
Bringing People Together

THE COMMUNITY, continued

Quality education is a priority in Ballwin. The community is served by two AAA rated districts. The premiere Rockwood School District serves 21,351 students in grades Pre-K through 12 on 30 campuses. Rockwood SD is recognized for high student achievement, outstanding teachers and staff, and great community support. Parkway School District serves 17,148 students in grades Pre-K through 12. Parkway's college entrance exam scores are among the best in the county and the District has 14 nationally recognized "Blue Ribbon" schools of excellence. Additionally, Parkway is accredited and recognized for "Distinction in Performance for High Achievement," the highest rating available by the Missouri Department of Elementary and Secondary Education.

Several major universities and colleges are located nearby including Washington University, St. Louis University, Maryville University of St. Louis, Missouri Baptist University, Webster University, St. Louis Community College, Lindenwood University, and University of Missouri-St. Louis.

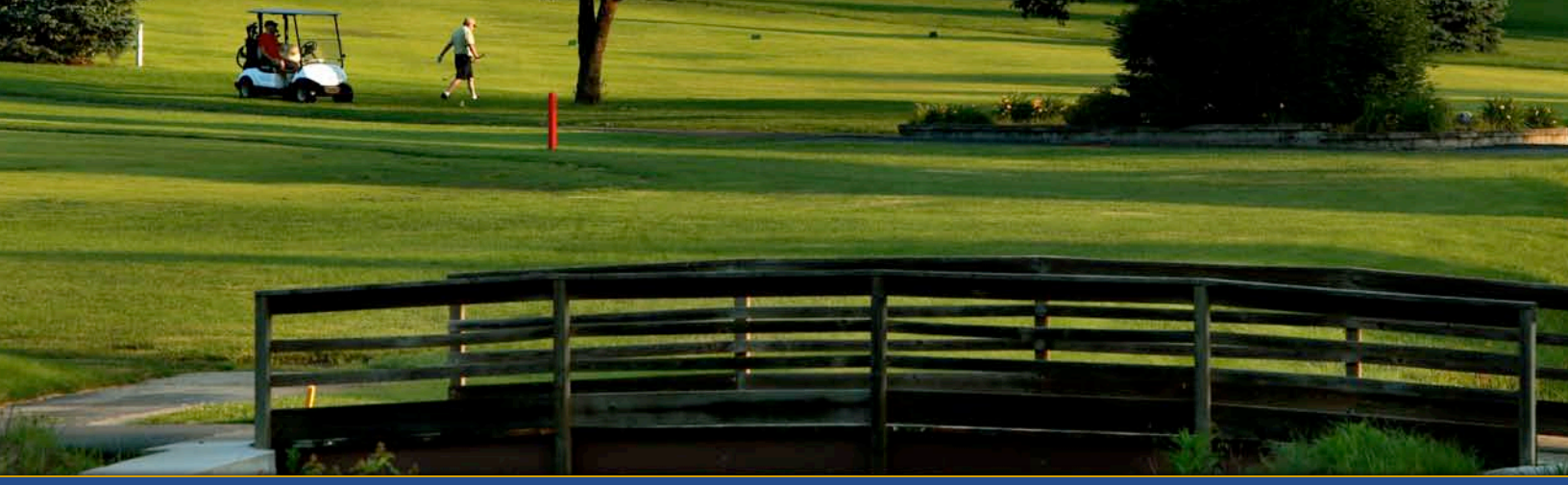
The median income in Ballwin is $81,351, and the average home price is $210,000.

GOVERNANCE & ORGANIZATION

The City of Ballwin operates under a Mayor-Alderman-City Administrator form of government. The Mayor and eight Aldermen make up the governing body and serve two-year terms. The Mayor is elected at large, and two Aldermen are elected from each of four wards. The City Administrator is the chief administrative official of the City and is responsible to the Mayor and Alderman for the day-to-day operations of the organization. The City Administrator is designated by ordinance to retain authority for all personnel decisions.

The City has 142 employees organized into four departments including Administration, Parks and Recreation, Police, and Public Works. Administration encompasses legislation, public relations, occupancy/building permits and inspections, code enforcement, planning, zoning, licensing, finance, human resources, and municipal court.

The City has a 2015 operating budget of $18.9 million. There has been no municipal property tax since 1987, and City services are financed primarily by sales tax, utility gross receipts taxes, and recreational revenues. Real estate taxes are collected by St. Louis County, the area school districts, and other governmental agencies. The utility tax rate is 7% and the sales tax rate is 8.113%.



LEADERSHIP & INNOVATION

There will be several key issues for the new City Administrator to address:

- Currently under review is the method of pooled sales tax distribution to municipalities in St. Louis County. Regardless, the new City Administrator should be prepared to explore viable new revenue sources to augment sales tax revenues.
- Several long-tenured department directors are expected to retire in the next three to seven years. It will be essential that the new City Administrator prepare for succession management and glean the significant “institutional memory” from these key staff members.
- Retention and attraction of retail businesses will be an important goal to ensure Ballwin’s continued economic growth in the region.
- The City seeks an initiative to encourage development of housing options for residents aged 55 and over with the City Administrator playing an important role in devising a plan.
- As with many communities, Ballwin has aging housing stock and aging infrastructure. The new City Administrator will need to develop a strategy to address these issues.
- The City Administrator will lead the development of a new city hall facility.

IDEAL CANDIDATE

The City of Ballwin has a very stable governing board. The Mayor and Aldermen seek a new City Administrator to lead the organization that includes a long-tenured senior staff and a dedicated work force that delivers a slate of high quality municipal services to residents. The current City Administrator is retiring after serving Ballwin in that role for 27 years.

The ideal candidate will:

- Desire to make Ballwin home for the long term
- Be energetic, yet have a calm and diplomatic leadership style
- Lead by example, maintain positive staff morale, and reward good work efforts
- Possess excellent presentation skills
- Be skilled at providing guidance to the governing board
- Have demonstrated knowledge of information technology and the use of social media
- Be active in the community
- Embrace innovation and be an “idea” person
- Have the ability to establish a leadership position among the city managers in St. Louis County

City of Ballwin, Missouri // City Administrator Position Profile

EDUCATION & EXPERIENCE

A Bachelor's Degree in public or business administration or a related field from an accredited college or university is required. A Master's Degree is required. The new City Administrator must have seven years of city management experience in a comparable community, or assistant city management experience in a larger city. Experience in a suburban community is a plus.

COMPENSATION & BENEFITS

The salary range for this position is $120,000 - $150,000 depending on qualifications and experience. The City participates in Missouri's Local Government Employees' Retirement System (LAGERS), and a full range of leave and insurance benefits is also provided. It is preferred that the chosen candidate establish residency in Ballwin. A car allowance and a relocation expense reimbursement are also provided.

APPLICATION PROCESS

Please apply online at http://bit.ly/SGRCurrentSearches

For more information on this position, contact:

Gary Holland, Senior Vice President
Strategic Government Resources
GaryHolland@GovernmentResource.com
405-269-3445

The position is open until filled. To view the status of this position, please visit:
http://bit.ly/SGRCurrentSearches

The City of Ballwin 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 Ballwin, MO
www.ballwin.mo.us

Parkway School District
www.parkwayschools.net

Rockwood School District
www.rockwood.k12.mo.us

TAB 13

FIRSTCHECK APPLICANT SCREENING

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.

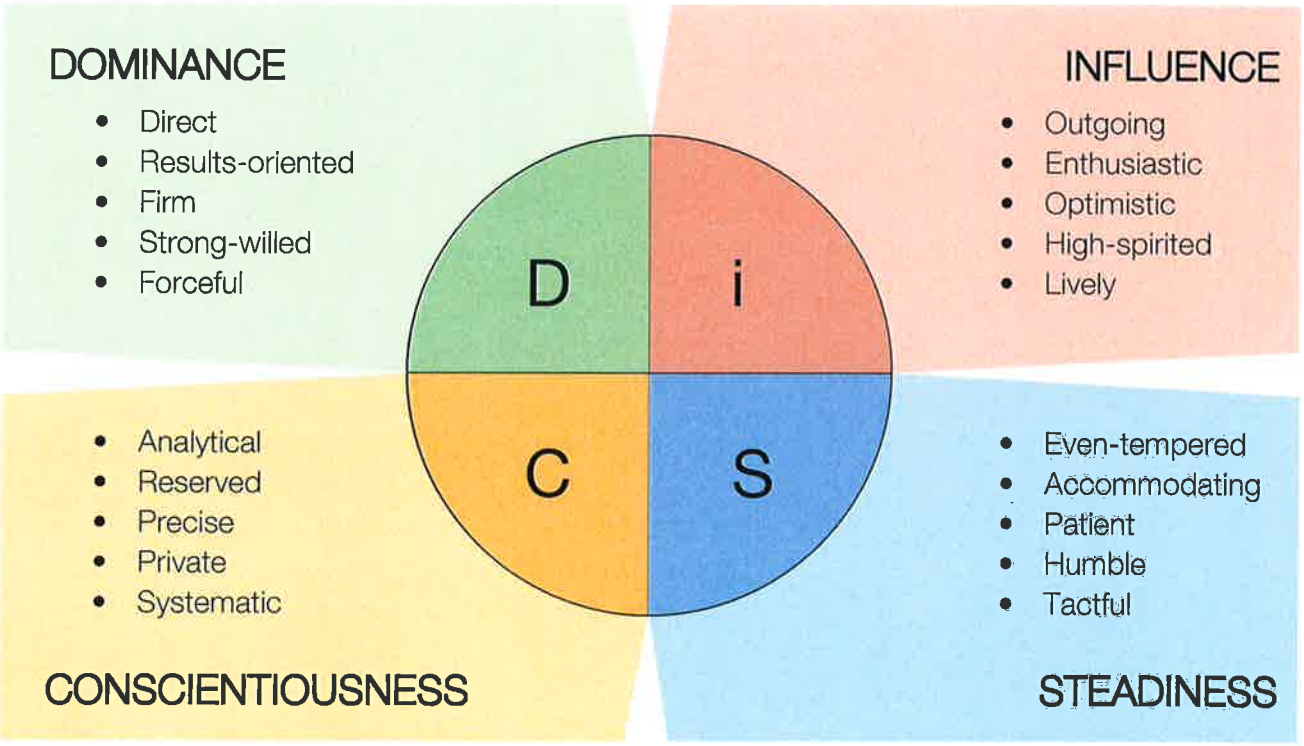
Or, maybe you're more comfortable working with those who take an optimistic, fast-paced approach than those who work at a steadier pace.

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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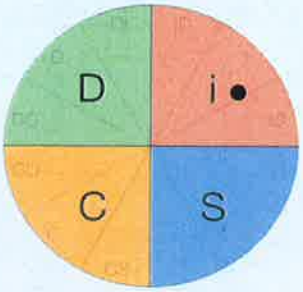
Your Dot Tells a Story

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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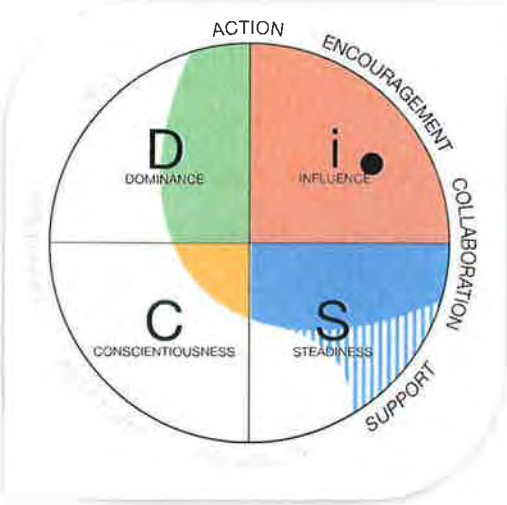
YOUR DiSC® PRIORITIES & SHADING

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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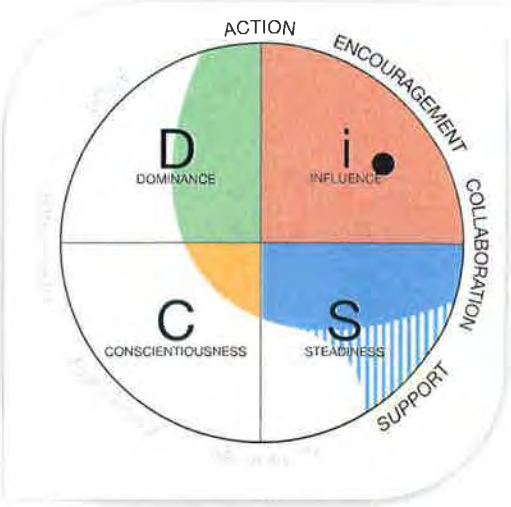
YOUR MANAGEMENT PREFERENCES

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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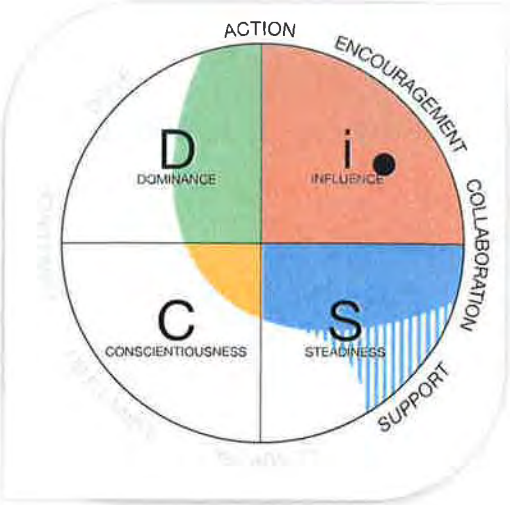
YOUR DIRECTING & DELEGATING STYLE

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

- 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

CHALLENGES

- 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

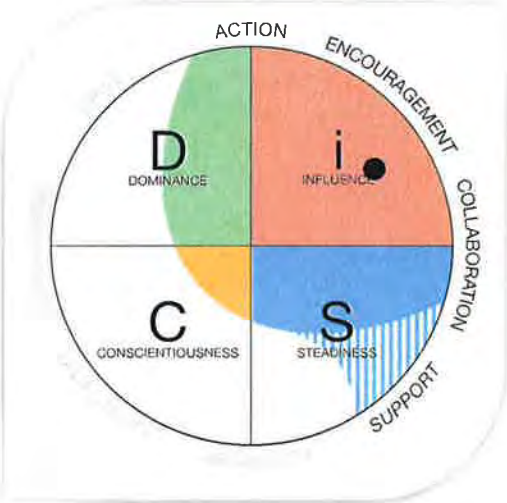
You can't motivate people. They have to motivate themselves. As a manager, however, you can create an environment where it's easy for people to find their own natural motivation. This means building an atmosphere that addresses employees' basic needs and preferences so they can do their best work, and 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?

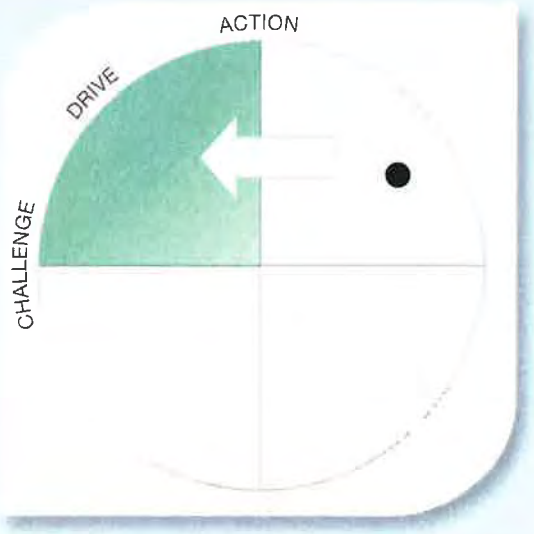
Employees with the D style are motivated to win, so they probably care more about the bottom line than how they get there. They're driven to achieve, probably more so than you, so they often thrive in competitive environments and can sometimes turn the most collaborative task into a contest. Furthermore, 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?

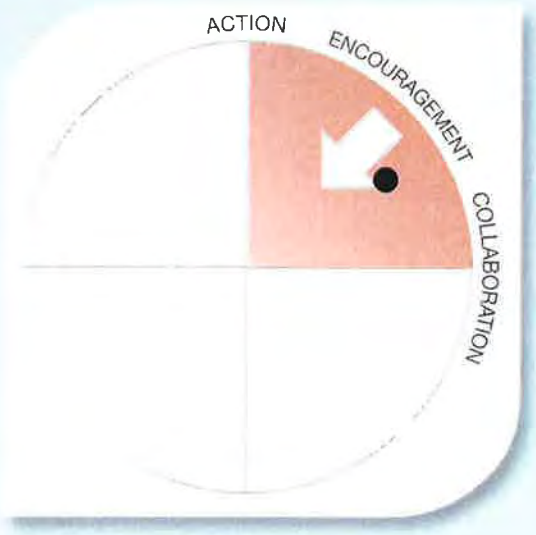
Employees with the i style look for high-energy environments where adventurous or groundbreaking ideas are valued. They're eager to collaborate, as you probably are, so they're likely to put a lot of energy into socializing and maintaining relationships. Because they like fun, vibrant settings, they 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?

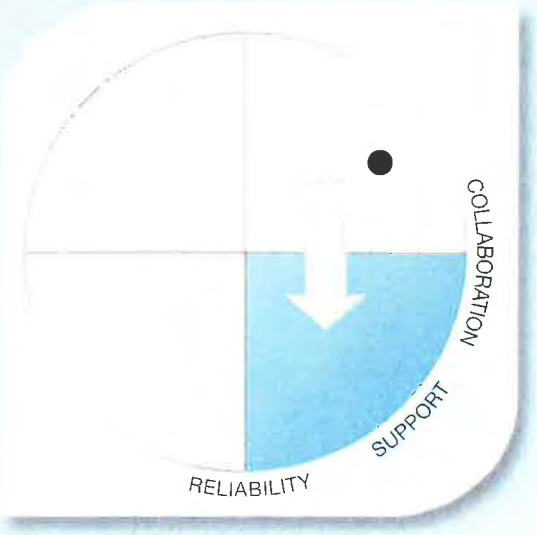
People with the S style prefer a calm, structured atmosphere where tension and conflict are rare. Like you, they tend to be supportive, and may even withhold their own opinions to accommodate or please other people. In addition, they like to connect with colleagues on a personal level by working in a 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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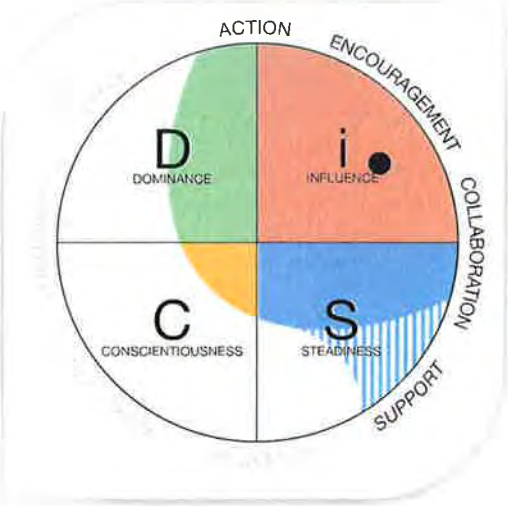
YOUR APPROACH TO DEVELOPING OTHERS

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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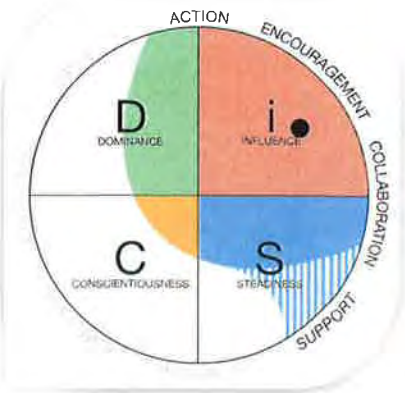
HOW YOUR MANAGER SEES YOU

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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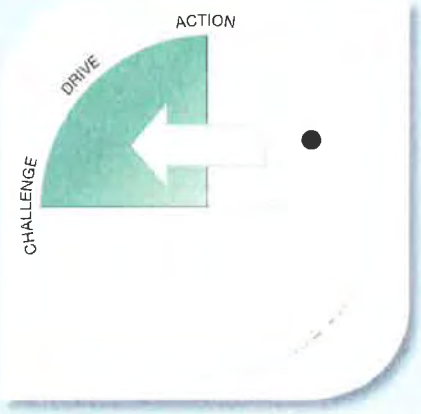
WORKING WITH "D" MANAGERS

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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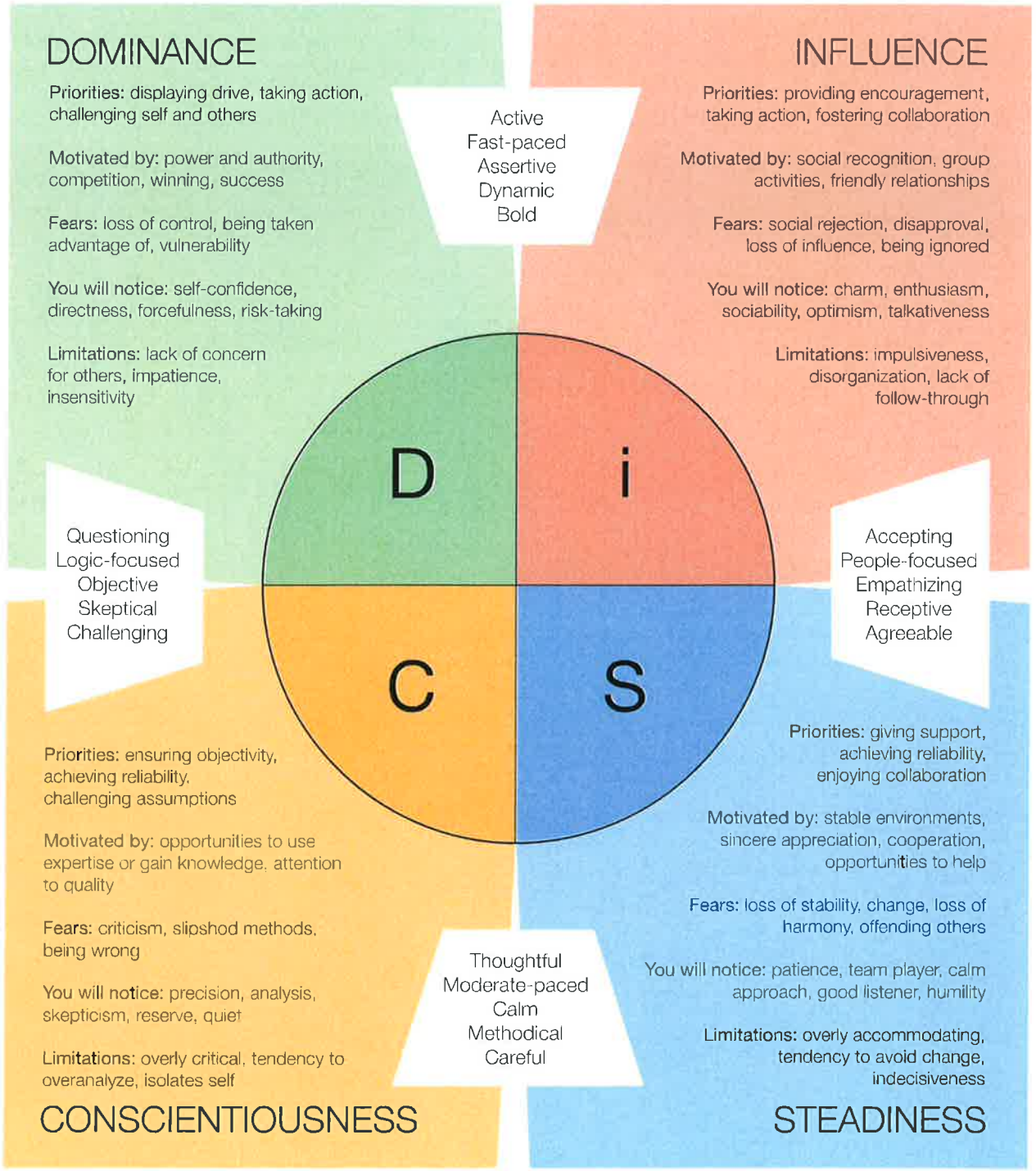
APPENDIX: OVERVIEW OF THE DiSC® STYLES

The graphic below provides a snapshot of the four basic DiSC® styles.



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COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

CITY OF RAYTOWN

PROPOSAL TO PROVIDE EXECUTIVE SEARCH FIRM SERVICES FOR CITY ADMINISTRATOR

Colin Baenziger & Associates

Project Manager and Contact Person:

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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…

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

May 27, 2016

The Honorable Mayor Mike McDonough and Aldermen Josh Greene, Karen Black,
Jason Greene, Jim Aziere, Janet Emerson, Mark Moore, William "Bill" Van Buskirk,
Steve Meyers, Steve Mock and Eric Teemanc
c/o Debbie Duncan, Human Resources Manager
City of Raytown
10000 East 59th Street
Raytown, Missouri 64133

RE: Proposal to Provide Recruitment Services for City Administrator

Dear Mayor McDonough and Aldermen Greene, Black, Greene, Aziere, Emerson, Moore,
Van Buskirk, Meyers, Mock and Teemanc:

Colin Baenziger & Associates (CB&A) would like to take this opportunity to submit a proposal to assist in finding your next City Administrator. 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 national recruiting firm having conducted assignments from Florida to Alaska and Maine to California with Virginia as one of our focus areas. 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 manager 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 Indianola, IA, Ankeny, IA, Ashland, KY, Bellevue, WA, Cottonwood Heights, UT, Destin, FL, Doraville, GA, Fayetteville, NC, Greensboro, NC, Mount Pleasant, MI, Roanoke, VA, Scottsdale, AZ, Springettsbury Township, PA, Tacoma, WA, Winchester, VA, and Yakima, WA. We have sought the County Administrators / Managers / CEOs for 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 City Managers for Cocoa Beach, FL, Mountlake Terrace, WA, and Savannah, GA. We are also seeking an Executive Director, Metro Waste Authority, in Des Moines, IA, a Deputy City Manager for Dickinson, ND, a County Attorney for Clay County, FL, a Deputy City Manager, Danville, VA and also for Sammamish, WA; a Finance Director for Miramar, FL, and a Director of Administration – Public Safety, Ocean Reef Community Association.

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,

Kathyrn Knutson
Vice President for Operations

Colin Baenziger
Principal / Owner

…Serving Our Clients with a Personal Touch…

PROPOSAL TO PROVIDE
EXECUTIVE SEARCH FIRM SERVICES

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I. Qualifications and Experience of the Firm

The Firm, Its Philosophy, & Its Experience

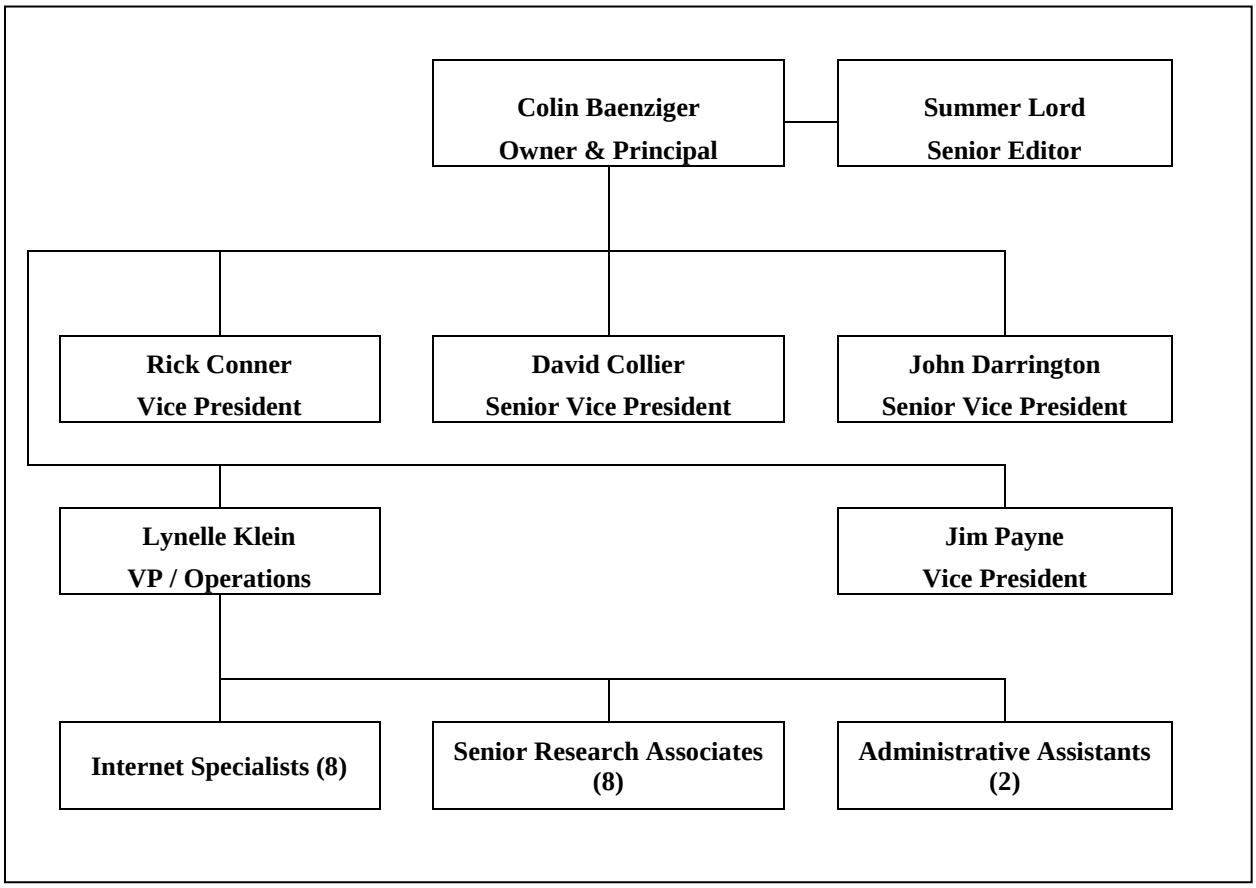
Colin Baenziger & Associates (CB&A) is a nationally recognized executive recruiting firm established in 1997 and owned and operated by Colin Baenziger. We are a sole proprietorship headquartered in Volusia County, FL with offices in Rhinelander, WI; Richland, WA and Salt Lake City, UT. As a sole proprietorship, 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 nineteen states. Overall our staff has performed over 150 City, County, and Special District Manager searches and approximately 200 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 15 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 through the end of 2011, forty-three percent of the individuals whom we placed as City and County Managers were minorities and/or women. Our placement percentage of women and minorities in 2014 was also 43%.

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.

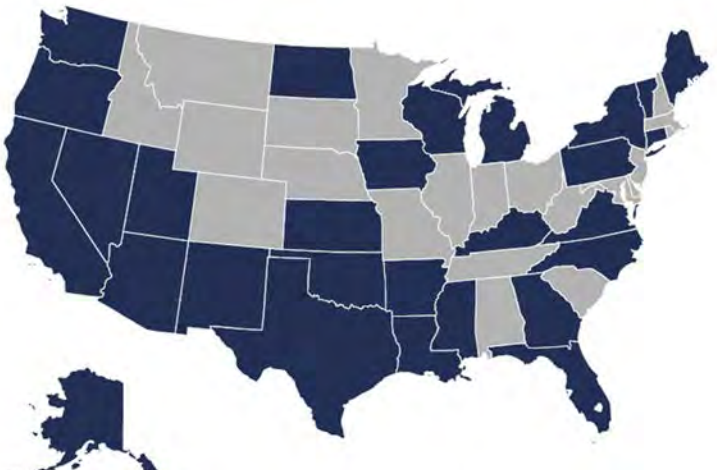
Insurance

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. With the recent addition of Maryland, his firm has now worked in 29 states, from Maine to California and Florida to Alaska. See the map below.

We have served clients in the states highlighed in blue.



A listing of our searches since 2011 follows and a complete list of our searches is contained in

Appendix A.

2016 City / County Manager Searches Completed					
	Position	**Client**	**Population**	**Placement**	**Agency Size: Number of Employees**
1	City Manager	Covington, VA	5,961	Richard Douglas	100
2	City Manager	Danville, VA	42,900	Ken Larking	1,100
3	City Manager	Fort Myers, FL	70,918	Saeed Kazemi	944
4	City Administrator	Fort Smith, AR	87,350	Carl Geffkin	937
5	City Manager	Norwich, CT	40,500	John Salomone	430
6	City Manager	Orange City, FL	11,600	Dale Arrington	100
7	City Administrator	Prosser, WA	5,845	David Stockdale	50
8	Chief Administrator	El Paso County, TX	827,700	Betsy Keller	480 under the Administrator
9	City Manager	Gainesville, FL	117,000	Anthony Lyons	1,300

2016 City / County Manager Searches Completed (continued)					
	Client	**Contact Name**	**Title**	**Phone**	**Email**
1	Covington, VA	Thomas Sibold	Mayor	(540) 958-8983	tomsibold@yahoo.com
2	Danville, VA	Sherman Saunders	Mayor	(434) 489-8738	sherman.saunders@danvilleva.gov
3	El Paso County, TX	Carlos Leon	Commissioner	(915) 546-2014	mmejia@epcounty.com
4	Fort Myers, FL	Randall Henderson	Mayor	(239) 321-7020	gpack@cityftmyers.com
5	Fort Smith, AR	Sandy Sanders	Mayor	(479) 784-2204	Mayor@fortsmithar.gov
6	Gainesville, FL	Todd Chase	Council Member	(352) 514-0168	chasetn@cityofgainesville.org
7	Norwich, CT	Deberey Hinchey	Mayor	(860) 823-3743	DHinchey@cityofnorwich.org
8	Orange City, FL	Tom Laputka	Mayor	(386) 775-5403	tlaputka@ourorangecity.com
9	Prosser, WA	Randy Taylor	Mayor	(509) 875-4367	RTaylor@ci.prosser.wa.us

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	Mill Creek, WA	18,800	Rebecca Polizotto	62
6	City Manager	Normandy Park, WA	6,600	Mark Hoppen	27
7	City Manager	Ocala, FL	56,600	John Zobler	940
8	City Manager	Palm Bay, FL	105,000	Greg Lynk	748
9	City Manager	Seminole, FL	17,800	Ann Deal	159
10	City Manager	Sequim, WA	6,670	Charlie Bush	73
11	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	Sergio Lewis	Former Commissioner	(915) 204-0191	Not available
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	Scott Hugill	Assistant City Manager	(425) 744-6208	SHugill@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. Search Methodology

The following search methodology has been refined over the past sixteen 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 Mayor and City Council Members, other key parties (such as City staff) and 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 Mayor and City Council Members and stakeholders consider important), and
- Determine a reasonable compensation package.

We will also finalize the timeline so candidates can mark their calendars well in advance and will be available when the Mayor and City Council Members wish to conduct the interviews.

If the City wishes, 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. These forums are valuable as they provide additional perspectives and a better understanding of the environment the Manager will be working in.

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 Mayor and City 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.

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.
- ***Advertising*** While we will seek out the best, we will not ignore the trade press as it often also yields strong candidates. We intend to advertise through organizations such as the International City/ County Management Association, Missouri Municipal League, Missouri City/County Management Association and so on. 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.
- ***Email:*** We will also e-mail the recruitment profile to our listserv of ten 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 Mayor and City Council Members. 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.

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 City Administrator 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 Mayor and City Council Members 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 by a knowledgeable staff member or resident.
>
> Later, that evening, the Mayor and City Council Members host a reception for the candidates. The purpose is to observe how the finalists respond to a social situation. Your next City Administrator will, after all, represent your local government in numerous venues. It is thus important to know how the individual will respond in a social setting. The reception also serves as an ice-breaker whereby the Mayor and City Council Members and the candidates get to know one another informally.
>
> **Day #2:** Beginning at approximately 8:30 a.m., each candidate interviews individually with each elected official for approximately 40 minutes. These meetings provide the Mayor and City Council Members with an opportunity to assess how the candidates might interact with them on an individual basis. It is very important to know if good chemistry exists. Ultimately, Managers succeed and fail based on their interaction with the Mayor and City Council Members and the one-on-one interviews are an excellent way to test that interaction.
>
> After lunch, the Mayor and City Council Members as a group will interview each candidate so that they can assess the candidates in a formal meeting. Part of the interviews may include a PowerPoint presentation so the elected officials can observe the candidates' presentational skills.

Task Nine: Debriefing and Selection

Once the interviews have concluded, CB&A suggests the Council adjourn and hold a meeting a day or two later to select the next City Administrator. Although the selection can be made the same day as the interviews, this decision is quite important and we recommend you take some time to consider what you have seen and heard.

In terms of the final selection, we have developed a simple methodology that moves the elected body quickly and rationally to the desired outcome. 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. 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 of the City Administrator, and any evaluations of the organization completed in the last year.

Possible Project Schedule

The following is the project schedule we suggest for this recruitment. We realize it may need to be adjusted to accommodate the Mayor's and Aldermen's availability.

Phase I: Needs Assessment / Information Gathering

June 6th:	CB&A begins meeting with the Mayor and City Council Members and, if suggested, other stake holders to understand the job and its challenges.
June 14th:	CB&A submits the draft of the full recruitment profile to the City for its review. Comments will be due back the following Tuesday.

Phase II: Recruiting

June 24th:	CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to over 12,600 local government professionals.
July 15th:	Closing date for submission of applications.
July 20th:	CB&A reports on the results of the recruitment.

Phase III: Screening, Reference Checks and Credential Verification

August 15th:	CB&A forwards its candidate report and materials to the City. These will include the candidates' resumes, the candidate introduction, and the results of our reference, background and Internet/newspaper archives checks.
August 22nd:	City selects candidates for interviews.

Phase IV: Interview Process Coordination and City Administrator Selection

September 8th:	City holds reception for the finalists.
September 9th:	One-on-one and full City Council Interviews and possible decision.
September 12th:	City selects its next City Administrator if the decision is not already made.

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 Ankeny, IA

City Manager

City of Bellevue, WA

City Manager

City of Fayetteville, NC

City Manager

City of Winchester, VA

City Manager

III. Proposed Project Staff

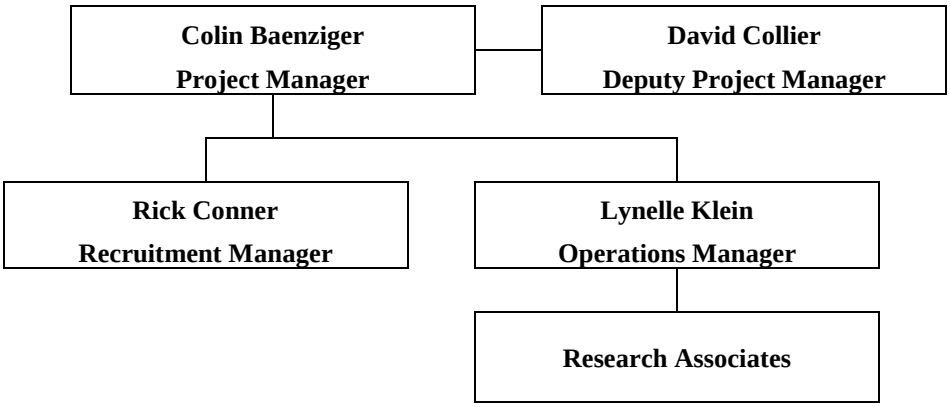
Project Team and Involvement

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 fifteen 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 ones 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 have the need for full time office staff. For example, she worked in the finance department of the advertising firm Livingston and Company, where she also served as the Interim Office Manager. She worked for TALX in South Carolina processing tax credits and incentives for businesses. Ms. Klein has an Associate's Degree from Brigham Young University in Rexburg, Idaho. She currently resides in King County, WA.

More CB&A Clients…

City of Roanoke, VA

City Manager
City Attorney
Economic Development Director
Finance Director
Human Resources Director
Planning, Building and Development Director

Oregon City, OR

Finance Director

James City County, VA

County Administrator

City of Scottsdale, AZ

City Manager

IV. References

The following are relatively comparable and relatively recent local government Chief Executive level placements

City Manager, Ankeny, IA (population 45,600)

Contact: Mayor Gary Lorenz at (515) 371-2141 or, **GaryL@ljmd.com**

CB&A began work on April 25, 2013, 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 through background checks, and recommending finalists for the county to interview. After careful deliberation, the City selected *David Jones, formerly County Administrator for Polk County, IA,* on August 7, 2013.

City Manager, Indianola, IA (population 14,800)

Contact: Mayor Kelly Shaw at (515) 962-5300, or KShaw@CityOfIndianola.com

CB&A was hired in mid-September, 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 county to interview. Through extensive outreach efforts, CB & A fielded an excellent group of candidates for the position. The City selected *Ryan Waller, formerly Assistant County Administrator with Lake County, IL* on December 5th.

City Manager, City of Madeira Beach, FL (population 4,200)

Contact: Mayor Travis Palladeno at (727) 239-5549, or TPalladeno@madeirabeachfl.gov

Madeira Beach is a tropical tourist location on the Western Coast of Florida in Pinellas County. Colin Baenziger and Associates began searching for a **City Manager** on September 30, 2011. 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. *Shane Crawford, former Assistant County Administrator with Walworth County, WI* was selected as the next manager on November 22nd.

City Manager, Miramar, FL (population 122,000)

Contact: Commissioner Yvette Colbourne at (954) 560-5161, or **ycolbourne@ci.miramar.fl.us**

CB&A began the search for Miramar's next City Manager on May 13, 2013. We conducted a nationwide search with an emphasis on Southeast Florida. Our work included extensive screening and background checks as well as coordinating the interview process and negotiating the compensation package with the selected candidate. The City selected *Ms. Kathleen Woods-Richardson, formerly Director of Public Works and Waste Management for Miami-Dade County,* on August 21, 2013. She began working for the City on September 9, 2013.

City Manager, City of Roanoke, VA (population 96,000)

Contact: Council Member Court Rosen at (540) 597-3193 or **courtrosen@gmail.com**

CB&A was hired in early September 2009 to find Roanoke's next **City Manager**. Roanoke is the cultural and commercial hub of southwestern Virginia. We were asked to identify someone with a strong background in finance and redevelopment. In preparation for the recruitment, we had six meetings to solicit public input (two with the public at large, one with the business community, one with the neighborhoods, one with the media, and one with the education, social services and non-profit community). Our efforts involved searching the country for strong candidates, conducting extensive background checks, recommending a strong field of candidates, overseeing the interviews and providing a small amount of assistance with the contract negotiations. *Christopher Morrill, formerly the Assistant City manager for Savannah, GA,* was selected in early December 2009. We have since assisted the City in finding a **City Attorney**, a **Finance Director,** an **Economic Development Director,** a **Human Resources Director** and a **Planning, Building and Development Director**.

City Manager, Tacoma, WA (population 198,400) in 2011

Contact: Mayor Marilyn Strickland at (253) 591-5100 or **Marilyn.Strickland@cityoftacoma.org**

CB&A was hired in late September 2011 to find Tacoma's next **City Manager.** As part of the recruitment process, we met with each of the nine council members to learn their concerns, priorities and desires. We searched the nation and developed a pool of 67 candidates, many of which were extremely capable. The semi- finalist pool was also diverse containing both women and minorities. Interviews were held in early December and *Mr. T.C. Broadnax, formerly an Assistant City Manager with San Antonio, TX*, was selected.

City Manager, Winchester, VA (population 16,000)
Contact: Council Chair John Willingham at (540) 931-4655, or
John.Willingham@WinchesterVA.gov

CB&A was hired in mid-March 2014 to find Winchester's next **City Manager**. The City was seeking someone with energy and enthusiasm to move the City forward. We accepted the challenge and searched the nation for just the right person. Our efforts included extensive outreach and we an excellent group of high quality candidates. We then performed background checks, coordinated the interview process, and assisted the City in selecting Eden Freeman, *formerly Assistant City Manager for Sandy Springs, GA,* in early June.

Candidate References

While it is important to deliver what the City or County 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	(757) 253-6604 **bryan.hill@ jamescitycountyva.gov**
John Salomone	Town Manager Newington, CT	City Manager Norwich, CT	(860) 539-8906 **cmoffice@cityofnorwich.org**

More CB&A Clients…

City of Greensboro, NC

City Manager

Matanuska-Susitna Borough, AK

Borough Manager

Union County, NC

County Manager

Loudoun County, VA

Director – Economic Development
Human Resources Officer

V. Fee and Warranty

Fee

To complete the engagement CB&A offers a firm, fixed fee of $24,500 ***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 as discussed earlier. 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.

Requested Services	Cost
Phase I: Needs Analysis / Information Gathering	$ 3,500
Phase II: Recruiting	10,000
Phase III: Screening	8,500
Phase IV: Interview Process Coordination and Managers Selection	1,500
Phase V: Negotiation and Continuing Assistance and Warranty	1,000
Total	$24,500

If the City or Board 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.*

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 two years, 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.

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

CITY OF RAYTOWN

PROPOSAL TO PROVIDE EXECUTIVE SEARCH FIRM SERVICES FOR CITY ADMINISTRATOR

Colin Baenziger & Associates

Project Manager and Contact Person:

Colin Baenziger (561) 707-3537
Colin Baenziger & Associates
2055 South Atlantic Avenue • Suite 504
Daytona Beach Shores, FL 32118
e-mail: ***Colin@cb-asso.com***
Fax: (888) 635-2430

…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, Cocoa Beach, FL (population 11,325)
City Manager, Savannah, GA (population 142,800)
Township Manager, Springettsbury, PA (population 26,700)

Deputy City Administrator, Dickinson, ND (population 22,300)
Assistant City Manager, Danville, VA (43,000)

Executive Director, Metro Waste Authority, Des Moines, IA (population served 730,000)

City Attorney, Port St. Lucie, FL (population 174,100)
County Attorney, Clay County, FL (population 196,400)

Finance Director, Miramar, FL (130,300)

Completed Searches in 2016

City Manager, Covington, VA (population 5,802)
City Manager, Danville, VA (population 43,000)
City Manager, Ft. Myers, FL (population 68,190)
City Manager, Fort Smith, AR (population 87,650)
City Manager, Gainesville, FL (population 117,000)
City Manager, Orange City, FL (population 10,942)
City Manager, Mountlake Terrace, WA (population 21,700)
City Manager, Norwich, CT (population 40,500)
City Manager, Prosser, WA (population 5,802)

City Attorney, Daytona Beach, FL (62,300)
City Attorney, Fort Pierce, FL (population 41,590)
Chief Administrator, El Paso County, TX (population 827,700)

Deputy City Manager, Sammamish, WA (60,000)
Finance Director, DeLand, FL (population 28,230)

General Manager, Chittenden Solid Waste District, Williston, VT (population 157,461)

Chief of Police, Mooresville, NC (population 35,300)
Director of Administration – Public Safety, Ocean Reef Community Association (pop. 2,000)

Public Works Director, Sammamish, WA (60,000)

Utilities Director, Danville, VA (population 43,000)

Governmental Search Assignments (continued)

Completed Searches Prior to 2016

City/Town/Village Manager/Administrator

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
Village Manager, Bal Harbour, FL (population 3,300) in 2013
City Manager, Bartow, FL (population 16,000) in 2007
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, Cape Canaveral, FL (population 10,200) in 2010
City Manager, Cape Coral, FL (population 154,300) in 2012
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 and 2015
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
Town Manager, Cutler Bay, FL (population 35,000) in 2006
City Manager, Dania Beach, FL (population 28,000) in 2009
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 8,500) in 2013
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, 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
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, Fruitland Park, FL (population 4,100) in 2013
Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1999 and 2005
City Manager, Greensboro, NC (population 259,000) in 2009

City/Town/Village Manager/Administrator (continued)

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 2002 and 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
City Manager, New Smyrna Beach, FL, 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, 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
City Manager, Orange Park, FL (population 9,100) in 2010
City Manager, Oviedo, FL (population 33,000) in 2008
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
Village Manager, Pinecrest, FL (population 19,300) in 2011
City Manager, Pompano Beach, FL (population 101,000) in 2007

City/Town/Village Manager/Administrator (continued)

City Manager, Portland, ME (population 65,000) in 2011
City Manager, Riviera Beach, FL (population 37,000) in 2009
City Manager, Roanoke, VA (population 96,000) in 2009
City Manager, Sarasota, FL (population 55,000) in 2012
City Manager, Satellite Beach, FL (population 10,100) in 2013
City Manager, Scottsdale, AZ (population 217,400) 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
City Manager, St. Pete Beach, FL (population 10,000) in 2014
City Manager, Stuart, FL (population 17,000) in 2006
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
City Administrator, Tavares, FL (population 11,000) in 2006
City Manager, Titusville, FL (population 43,940) in 2014
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, 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, 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
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

County Administrator / Manager - Completed Searches (continued_

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, MI (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 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
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, Fulton County, GA (population 996,319) in 2015
County Attorney, Prince William County, VA (population 438,580) in 2015
City Attorney, Roanoke, VA (population 96,000) in 2012
City Attorney, West Melbourne, FL (population 15,000) in 2008

Completed Searches – Community Development/Growth Management/Planning

Growth Management Director, Collier County, FL (population 328,000) in 2015
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, 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, Danville, VA (population 43,000) in 2014
Finance Director, Daytona Beach, FL (population 31,860) in 2012
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
Treasurer, Miami, FL (population (408,000) in 2013
Finance Director, Oregon City, OR (population 31,860) in 2012
Finance Director, Roanoke, VA (population 99,000) in 2014
Director of Finance and Administration, Roanoke Regional Airport, Roanoke, VA, in 2014
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 2104

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, 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

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)
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

Completed Searches – Public Works

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
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
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
Executive Director, Onslow Water & Sewer Authority (Jacksonville, NC) (pop. 160,000) in 2009
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
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

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, 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
General Manager, Holiday Park Recreation District, FL (population 4,500) in 2007
Special Projects Coordinator, Islamorada, Village of Islands, FL (population 7,500) in 1998

Appendix B

Sample Brochure:
City Manager Search, Ankeny, IA

city of Ankeny

bringing it all together

Apply by June 7, 2013

If you are looking for a rapidly growing, dynamic community with solid Midwestern values of hard work, integrity and friendliness, you have just found the right place.

Ankeny is Iowa's 11th largest city. It is located 13 miles north of the state capital, Des Moines, and 25 miles south of Ames, IA, the home of Iowa State University. Interstates 35 and 80 intersect in Ankeny, making the City an ideal commercial location and an easy commute to the entire United States mid-west region. It is a growing commercial hub that, while near Des Moines, grew independently at first as a coal mining and agriculture center and then later as an industrial center. The City is proud of its independent identity even though many of its residents work outside its boundaries. Polk County is the third largest insurance center in the world and that industry, as well as the variety of others that the county possesses, provide many opportunities for personal and professional growth.

Ankeny is a vibrant community and nationally recognized as a great place to live and raise a family. While it is not contiguous to any other city, it offers an upscale suburban feel and numerous cultural and recreational activities. It has 39 parks (including two water parks), many trails that are part of a regional 250-mile system and events such as Movies Under the Stars, Summer Sounds and Ankeny Unplugged (a summer concert series). It also has numerous festivals such as SummerFest, All City Play Day, the DMACC Kite Festival and Ankeny Art in the Park. Finally, it is home to the Uptown Farmer's Market. The

community places a priority on education and its schools are excellent both academically and in terms of competitive sports. Housing is reasonably priced, and the community is very safe. Best of all, residents take pride in their community, maintain their properties, are engaged in civic life and are friendly and neighborly. Block parties are a common event and if you need a helping hand, friends and neighbors are there to help.

Ankeny has been routinely recognized for its excellence. Some of its numerous awards include the Playful City USA award from the KaBOOM! Foundation for seven consecutive years, being named as one of the top 100 places to live in the USA by CNN and Money Magazine in 2011, and winning the 2012 3CMA Savvy Award for social media and citizen participation. Furthermore, the greater Des Moines area, of which Ankeny is a significant part, has also been named the top area for young business professionals and the second best area for business by Forbes Magazine in June of 2011.

For the sports fan, Iowa State University with all of its collegiate programs is a short 20-minute drive north to nearby Ames, Iowa. In addition, the Iowa Barnstormers, an Arena League professional football team, and the Iowa Energy, an NBA Developmental League affiliate of the Washington Wizards, Denver Nuggets, New Orleans Hornets, and Chicago Bulls, plays in the Wells Fargo Arena in Des Moines just 20 minutes to the south. The Chicago Cubs have a Triple-A affiliate, the Iowa Cubs, which also plays in Des Moines. For those that prefer to participate, the City has numerous recreational and cultural amenities. Water sports at Saylorville Lake and hiking and biking trails are just minutes away from anywhere in the community. Hunters will enjoy the local deer, turkey and pheasants. The City is a short drive from Des Moines-area destinations such as Blank Park Zoo, the Science Center of Iowa and downtown events such as the nationally recognized Des Moines Art Festival and farmers market. The Des Moines Performing Arts Center has a variety of widely anticipated events scheduled. Some of the these include musical performances by the renowned Blue Man Group and The Tenors, and Broadway Musicals such as the Phantom of the Opera, Wicked, and Rock of Ages. The nearby Iowa Events Center consistently attracts well known musical artists. The Center has concerts currently scheduled for Kenny Chesney, Fleetwood Mac, Justin Bieber, and Taylor Swift within the next 12 months. Finally, the Iowa State Fairgrounds, Des Moines Art Center and Pappajohn Sculpture Park are all within a 30-minute drive.

For the family, Ankeny's school system is one of the best in the Midwest and offers an excellent education. By the 2013-2014 school year, the system will have 15 schools – nine elementary schools, four middle schools, and two new high schools. The Ankeny Community School District, with a total enrollment of roughly 9,000 students, boasts small class sizes and had a graduation rate last year of 96.4%, with most students going on to higher education. Ankeny Christian Academy is a growing private school option for K-12 service to students.

Ankeny's location provides easy access to nationally recognized institutions like Drake University in Des Moines and Iowa State University, a major research university. The main campus of Des Moines Area Community College is located in Ankeny and provides valuable education and training for the area's talented employees. With these resources, Ankeny has developed as not only a premier community to raise children, but also as a place to establish businesses with a highly-skilled workforce and access to university resources.

Housing prices in the area are affordable with options to accommodate any price range or lifestyle. A typical 3 bed/2 bath home between 1,500 to 2,000 square feet is priced from $150,000 to $225,000. More upscale living is available for $300,000 and up. Average property values are slightly lower than the national average which make it an an excellent time to buy. The overall cost of living index is below the national average currently sitting at roughly 89.

Ankeny has a variety of retail outlets, making it easy to find the goods and services you want without having to stray too far from home. The Delaware Shopping District offers over 100 stores with a variety of name brand and specialty items. Well-known box retail stores in the District include, Wal-Mart, Kohl's, Target, and others. Historic Uptown Ankeny offers quaint retail spots for antiques, art and more eclectic items.

To conclude, Ankeny is a beautiful city just north of Des Moines that is home to a plethora of attractions. It is a warm and friendly place to live, work, shop, and play - rich with history and full of boundless potential.

History

The central Iowa area's story is almost as old as recorded history in the Americas. Originally inhabited by a variety of Native American tribes, the area's written records began in 1673 when Father Jacques Marquette and Louis Joliet became the first Europeans to settle in Iowa. In 1803, the area joined the United States as part of the Louisiana Purchase. Westward expansion and settlement began in earnest after the end of the War of 1812 and in 1820 Indian resentment over the settlers' actions caused the start of the Black Hawk War. 14 years later the war ended and by 1840 the white settler population of Iowa had grown to 10,000. In 1842 the Iowa Territory signed a treaty with the Sac and Fox Indian tribes paying about ten cents per acre for their land.

In 1843, Fort Des Moines was constructed and shortly thereafter, a general store and trading post opened. Polk County, named after then President James K. Polk, was established in 1846, and in 1851, Fort Des Moines was incorporated as a city. At the time, land was selling at

$1.25 per acre, a double log cabin could be erected for $70 and butter was ten cents per pound.

John Ankeny was born on May 6th, 1824 and moved to central Iowa in 1869. Over the course of his life he developed political leanings that led him to participate in Lincoln's election campaign of 1860 and in 1872, become a city council member for the City of Des Moines. He built the first store and post office in what later became the city of Ankeny.

In the late 1800's a small town began to arise around the amenities that Ankeny built, including railroad tracks, a Methodist Church, a livery stable, a blacksmith shop, a rooming house, a machine shop and a school. The local economy of the time was based on the farming of sorghum to make molasses.

Ankeny incorporated as a town of one square mile in February of 1903. Telephone service quickly followed and electricity was made available for the first time in 1907. In 1908 the Anderson Coal Company began mining coal in the area and many businesses developed in the area based on its production. In the 1930's and 1940's a series of events occurred which changed the face of the town forever. In the 1930's, several fires occurred which almost completely destroyed the local uptown area. Most businesses rebuilt, but growth was slow until 1942, when the federal government built a munitions factory in Ankeny to assist in the war effort. At one time, it employed 19,000 people.

In 1947, John Deere bought the munitions plant and a majority of the land and turned it into a factory to produce corn pickers. That brought a commercial industrial presence to the economy of the area, and

Table I: Climate Data for Ankeny

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Average High ˚F	30	35	48	63	73	82	84	83	77	64	47	32	60.0
Average Low ˚F	12	17	28	39	50	60	64	62	53	41	28	15	39.1
Precipitation in Inches	0.7	0.9	2.1	3.5	4.4	5.0	4.4	4.3	3.1	2.7	2.0	1.1	34.1

Source: The Weather Channel

Ankeny's growth, development, and population began to swell.

Over the years, the proximity to Iowa's state capital, as well as the ideal location along two major highways, led to the diversification of Ankeny's economy until it has become an economic power in its own right.

Climate

Located very near the center of North America and far removed from any major bodies of water, the climate is characterized as humid continental with hot, humid summers and cold snowy winters.

Summers bring average high temperatures in the mid 80's and lows in the mid 60's. The low temperatures in the winter tend to be in the upper teens. The City's heaviest rainfall occurs in in the spring and summer (averaging 4.0 inches/month) and the least in the winter months (averaging about 1.2 inches/month). See Table I for climate data.

Demographics & Growth

Ankeny is a city that has experienced explosive growth in the last several decades bringing with it much opportunity and economic development. See Table II for details.

During the 2000-2010 period, the City accounted for 15% of the total population growth in the entire state of Iowa. The City's population is projected to grow to nearly 60,000 by 2020.

In terms of age, Ankeny is a fairly young city as can be seen from Table III on page 6. Further, its median age of 32.7 is well under the U.S. median of age of 37.2.

The City's population is 94.7% White, 1.2% Black or African American, 2.0% Asian, 2.1% other, with Hispanics representing 2.3% of the population across all races.

The City's residents are relatively well off economically. The unemployment rate as of 2011 was only 5.9%, and many businesses report that employment in the City has either returned to, or now exceeds pre-recession levels. The median household income is approximately $72,700. That compares well to the state of Iowa ($50,451) and United States (approximately $50,000). A full 60% of the households have an income between $50,000 and $150,000, and almost another 10% has a household income above $150,000. Only 4.3%

Table II: Ankeny Population History

Census	Population%	Change
1910	445	---
1920	684	45.5%
1930	632	-2.5%
1940	779	23.3%
1950	1,229	57.8%
1960	2,964	141.2%
1970	9,151	208.7%
1980	15,429	68.6%
1990	18,482	19.8%
2000	27,117	46.7%
2010	45,582	68.1%

Source: Iowa Data Center

Table III: Distribution by Age

Age Group	Percent
0 to 5	8.9%
5 to 15	14.5%
15 to 25	12.9%
25 to 35	17.8%
35 to 45	16.2%
45 to 55	11.8%
55 to 65	9.3%
65 to 75	4.7%
75 to 85	2.9%
85+	1.0%

Median Age	32.7

Source: U.S. Census

of the City's population lies below the poverty line.

Educationally, 81% of the population over the age of 25 have a post high school education or training, 14% have an associate's degree, 36% an undergraduate degree and 15% hold a postgraduate or professional degree.

Commerce

Ankeny has a broad and vibrant economy as indicated in Table IV. Moreover, several bioscience and manufacturing companies are currently expanding their facilities and workforce, adding to the City's already strong commercial base. Since 2010, with a proven Economic Development Plan, the City has attracted over $100 million of commercial investment, more than 1 million square feet of building expansion and created or retained over 600 local jobs.

The City's Ankeny Regional Airport is the third busiest airport in the state of Iowa and provides commercial and general aviation services to its customers.

A statistical analysis of the City reveals that 18.0% of its population works in the financial, insurance, and/or real estate industries, 24.1% works in educational, health care, and/or social services fields, and 12.3% work in the retail trade. The remainder of the City's workforce of almost 25,000 is spread across a variety of occupations in other fields.

All in all, Ankeny is home to a robust and diverse economic base that has weathered the effects of the recent economic downturn very well.

The Government

Ankeny is governed by a Mayor and a five member Council. The Mayor does not vote but can veto Council passed measures. All are elected at large and serve four-year terms. Elections occur in odd numbered years and the next election is this November when the Mayor and two Council seats will be up for election. The current Mayor intends to seek re-election. He had previously served on the City Council for eight years and was appointed last year to complete the term of the prior Mayor who was elected to the Polk County Board of Supervisors. One of the other Council Members may not seek re-election. Over all it is a relatively new council with four members currently serving their

Table IV: Principal Employers

Employer	Employees
John Deere	2,116
Ankeny Community Schools	1,654
Des Moines Area Community College	1,603
Casey's General Stores (Headquarters)	585
Perishable Distributors of Iowa	533
City of Ankeny Government	497
ACH Food Companies, Inc.	475
SYSCO Food Services of Iowa	251
Praxair	157
Accumold	150

Source: City of Ankeny 2012 CAFR

first terms and one in his second term. All are collegial, behave professionally and serve with the common goal of making the community a better place. The staff is a strong, professional and cohesive group committed to public service and the Ankeny community. Overall the community seems pleased with the City's direction and the quality of services it receives. In fact, in the 2012 annual citizen's survey, almost 70% of the residents said they supported the direction the City was taking and 60% reported they felt the value received for their tax dollar was good or excellent. The vast majority feel that Ankeny's image is good or excellent.

The City provides all the services a city typically does: Community and Economic Development, Fire, Library Services, Parks (including a golf course and two water parks), Police, Public Works, Recreation and Utilities (water, sewer and stormwater). The airport is operated by the Polk County Aviation Authority. Service levels and expectations are high. For example, at the library over 10,000 children participate in the summer reading program and 200 children participate each day in the pre-school reading program.

Unlike many local governments, the City's taxable valuation has continued to grow even during the recent recession and now totals $2.2 billion. The City's total expenditure budget for FY 2013-2014 is projected to be $105,169,645 which is down from $127,322,380 in FY 2008-2009.

While the City has 207.75 fulltime equivalent employees, the number can grow to 600 during the summer with the various programs the City adds. The largest departments are: Police with 61.50 FTEs, Fire with 27.00 FTEs, Municipal Utilities with 26.50, Public Works with 25.00, Parks and Recreation with 20.00 and Planning and Building with 17.25. Every other department and function has less than 10 employees. The City has three bargaining units: Police, Fire and American Federation of State, County and Municipal Employees (AFSCME). All recently signed five year contracts.

The Challenges and Projects

The City's challenges are significant but manageable. First and foremost is growth. As previously stated, during the 2000-2010 period the City accounted for a full 15% of the population growth in the entire state of Iowa. The City has averaged 738 residential building permits annually in the last ten years. The high was 1,311 in 2005 and the low was 372 in 2008. Whether or not growth will return to the explosive levels of the 2003 to 2005 years remains to be seen, but growth is currently steady and expected to continue. Keeping up with the growth will require the organization to stretch. One specific area that bears consideration is impact fees. They are presently very small in comparison to those of many other communities.

The second challenge comes with the growth. Due to the explosive expansion of the City in recent years, there are many capital projects that need to be accomplished and the next manager will need to address them. In addition, much of the infrastructure in the older parts of Ankeny is reaching the end of its anticipated useful life and will need to be replaced and/or upgraded. The residents are supportive of City efforts, but they have high expectations and meeting those expectations will require hard work and creativity given limitations on resources. The positive news for Ankeny's next City Manager is the residents are willing to pay for services. For example, in 2006, a bond referendum to upgrade the City's public safety facilities was approved by 82% of voters and in February of this year voters approved a 10th elementary school with 66% of the vote.

The third challenge is that some of the City's facilities are exceeding capacity. The Public Library is undersized and the City needs another fire station. Other less visible needs are that some of the City staff is housed in leased space and storage is limited.

A fourth challenge is to address the replacement of a number of key staff who have left in the recent past or will be leaving by the end of this year, primarily due to eligibility for early retirement. Succession planning was done, but a number of the key successors have left to pursue other professional opportunities. Recruitment to fill currently vacant positions is already underway.

A fifth challenge is to encourage economic development.

Ankeny is a rapidly growing city that could reach a population of 150,000 at build-out. Ankeny needs to continue to expand its commercial base to ensure employment opportunities are available for its highly skilled workforce.

Finally, with a relatively new Council and many new or recently promoted staff, it will be necessary to rally the City government around a vision and to re-establish the level of trust and camaraderie that existed in the past.

The Ideal Candidate

The City is looking for an experienced manager and leader to partner with the Mayor and City Council to help Ankeny fulfill its potential. The next manager will see the big picture, embrace the City's vision and strategic plan and work diligently to build consensus around it. He/she will serve as a trusted advisor to the elected officials and someone who can say "no" when "no" is the answer that best serves the community as a whole. The individual will also understand he/she works for the elected body and once the direction is set, do his/her best to implement that direction. The individual will be intelligent, upbeat, friendly, outgoing, positive, articulate and progressive – someone with a "can do" attitude who is visionary yet practical. He/she will be flexible but consistent, cheerfully persistent and a leader – not a bureaucrat.

The next manager will have excellent communications skills and use them. The best candidate will be someone who can make residents feel their views are being heard and who will help build consensus. Customer service will not be just a catchy phrase with the next manager but rather, along with integrity, a core principle and a way of life. He/she will be someone who finds solutions to problems and is always looking for ways to improve efficiency and to make the government more responsive. He/she will be respectful of others, delegate and encourage an environment where creativity will flourish. The individual will be able to recognize talent, mentor that talent and be confident enough to then step back and let the staff member do his/her job. The ideal candidate will give assignments and set broad performance parameters, but will also expect results and hold employees accountable. The individual will believe in transparency, and be open and approachable. Other important characteristics are experience managing with limited resources and the ability to work with other government agencies including the Ankeny Community School District. As Iowa's 11th largest city and second largest in Polk County, Ankeny expects to have a regional presence and the Council is looking for someone who can help shape Ankeny's role in the region. Good judgment and common sense are essential.

The desired candidate will have a demonstrated track record of achievement in leadership, management, finance and economic development. Knowledge of and experience with intergovernmental relations is critical. He/she must know how to

build relationships that encourage regional cooperation.

The position requires a master's degree in business administration, public administration, public policy or related field and at least seven years of increasingly responsible experience as a senior level government or private sector executive.

Compensation

The anticipated salary range is $140,000 to $200,000, and the actual salary will depend on qualifications.

The Most Recent City Manager

The most recent City Manager retired after 27 years of service as the City Manager. The interim city manager plans to retire December 31, 2013 and once the newly hired city manager begins working, the interim manager will return to his assistant city manager role.

Residency

Residency within the city limits is required.

How to Apply

E-mail resumes to RecruitEight@cb-asso.com by June 7, 2013. Printed and mailed resumes, and faxed resumes, will not be accepted. Questions should be addressed to Colin Baenziger of Colin Baenziger & Associates at (561) 707-3537.

Confidentiality

Candidates who wish confidentiality should indicate that desire in their cover e-mail, or in the heading of their resume. All documents can remain confidential until the five finalists are selected. At that time, the finalists' names (but not the names of other applicants) will be released, along with any background material compiled during the search (except comments by references).

The Process

Interviews will be held on August 5th and 6th with the next City Manager selected on August 7th.

Other Important Information

Ankeny is an Equal Opportunity Employer and embraces diversity. It encourages women and minorities to apply.

COLIN BAENZIGER & ASSOCIATES
EXECUTIVE RECRUITING

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

City Manager

Appendix C

Sample Candidate Report

SECTION “C” BEGINS

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

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

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.

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

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 Manger. 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 BROADY*

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

SECTION “C” ENDS

Appendix D

Sunnyside, WA Resolution Thanking CB&A for Its Outstanding Service

RESOLUTION 2013 - 59

ORIGINAL

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SUNNYSIDE, WASHINGTON, THANKING COLIN BAENZIGER & ASSOCIATES FOR ITS OUTSTANDING PERFORMANCE IN CONDUCTING THE EXECUTIVE SEARCH FOR THE CITY'S NEW CITY MANAGER

WHEREAS, the City Council by Resolution 2013-30, retained Colin Baenziger & Associates (CB&A) to identify and recommend candidates for the office of City Manager; and,

WHEREAS, CB&A staff worked diligently to find and produce excellent candidates, and provide the City Council, Citizen Advisory Board and Employee Personnel Committee with comprehensive materials concerning the candidate's aptitude, experience and background, including, complete and thorough interviews, references, extensive checks of criminal, civil and financial history, verification of employment and education, and exhaustive reviews of Internet and news media archives; and,

WHEREAS, CB&A's process was open and transparent, fair and unbiased and was well received by the City Council, City staff, the press, and the public; and,

WHEREAS, the City Council wishes to express its gratitude to Colin Baenziger & Associates for its efforts on behalf of the City;

NOW, THEREFORE, IT IS HEREBY RESOLVED BY THE CITY COUNCIL OF THE CITY OF SUNNYSIDE, WASHINGTON, as follows:

Section 1. **Recitals.** The preceding recitals are true and correct and are incorporated herein by this reference.

Section 2. **Acknowledgement.** The City Council wishes to express its sincere appreciation and gratitude to the firm of Colin Baenziger & Associates for its outstanding support and effort in assisting the City in finding its City Manager, Mr. Donald Day.

Section 3. This Resolution shall be effective upon passage, approval and signatures hereon in accordance with law.

PASSED this 12th day of August, 2013.

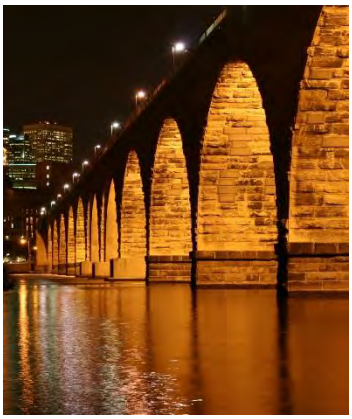
JAMES A. RESTUCCI, MAYOR

ATTEST:

DELILAH SAENZ, CMC, CITY CLERK

APPROVED AS TO FORM:

KERR LAW GROUP, LLP
Attorneys for the City of Sunnyside



Proposal

City of Raytown, MO

Proposal to Provide Executive Recruitment Services

June 1, 2016

W&C | Waters & Company
A Springsted Company

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Waters & Company
14285 Midway Road, Suite 340
Dallas, TX 75001

Tel: 972-481-1950
Fax: 972-481-1951

www.waters-company.com

LETTER OF TRANSMITTAL

June 1, 2016

The Honorable Mike McDonough, Mayor
City of Raytown
10000 East 59th Street
Raytown, MO 64113

Re: **Request for Proposal to Provide Executive Recruitment Services**

Dear Mayor McDonough,

I appreciate the opportunity to submit our proposal for executive recruitment services for the City of Raytown's next City Administrator. Our extensive experience in providing executive recruitment services to cities, counties and other public sector organizations nationwide will be beneficial for this recruitment and allow us to find the ideal candidate for the City of Raytown.

We know that you have options for using other recruitment firms. However, we believe that our approach sets us apart from our competitors in the following unique ways:

- Waters & Company, *a Springsted Company* (W&C) will be aggressive and responsive to you - the client - and with prospective applicants using an approach of "*doing whatever it takes to get the job done right!*" Please notice our "Triple Guarantee" referenced in Section III of this Proposal;
- W&C recommends advertising and recruiting nationally, but would also focus on making contact with public administration professionals currently working in Missouri and in some of the surrounding states, believing that a regional focus can sometimes bring in candidates more knowledgeable about the nuances of working in Missouri and the Midwest;
- W&C will provide, if requested, Management/Leadership Style Assessment Analysis completed by the candidates to determine if a candidate's management style matches the approved management / leadership style profile for the ideal candidate;
- We will use a proprietary on-line video interview process to assist the Mayor and Board of Aldermen in narrowing down semi-finalists to a smaller group for on-site interviews. This unique on-line video system will be made available as part of the all-inclusive fee to better assist in screening candidates and can possibly reduce costs by eliminating unnecessary travel expenses for on-site interviews; and

- Utilization of a proprietary online application system exclusively licensed to W&C to facilitate talent management. The system has been designed by W&C to customize applicant flow and tracking. It allows ease of communication with applicants and the ability to conduct database inquiries for candidates based on characteristics important to the City such as geographic location and specific experience, expertise and qualifications.

Finding candidates with the desired levels of experience and specific knowledge required to oversee a municipal operation can sometimes be challenging. Because of my unique background as a former city administrator for one of the fastest growing communities in the Midwest, I understand the nuances related to recruiting for a position like this. We are very familiar with the City of Raytown and my 10-plus years of experience in recruiting senior level city executives will provide you with valuable insight into finding and selecting the best possible candidate.

The proposal document will provide you the details about our approach, expertise, client references and pricing for this executive recruitment. If you have any questions, please contact me at 816-868-7042 or by email at adavis@waters-company.com. Our Team would consider it a professional privilege to provide these services to the City of Raytown.

Respectfully submitted,

Art Davis, Senior Vice President
Consultant

sml

City of Raytown, MO
Proposal to Provide
Executive Recruitment Services

I. General Information

Waters & Company (W&C) recently merged with Springsted Incorporated, establishing one of the largest public sector executive recruitment and organizational management firms in the United States. Springsted Incorporated, the parent corporation, is a WBE. Three employee-owners lead the firms and their 70-member staff. Our principal corporate office is located in Saint Paul, Minnesota, with regional offices located in Dallas, Texas; Milwaukee, Wisconsin; Cleveland, Ohio; Des Moines, Iowa; Kansas City, Missouri; Richmond, Virginia; Denver, Colorado and Los Angeles, California.

W&C has a team of seven primary recruitment consultants available to meet your executive recruitment needs. Each consultant assigned to this recruitment has experience working with cities and the many different disciplines that comprise the City of Raytown organization. Our consultants bring an experienced, participatory and energetic perspective to each engagement; our unique approach and personal touch are reflected in our internal standard to provide outstanding services that exceed the City's expectations. Since 2010 our combined consultant team has conducted more than 475 executive recruitments.

The W&C Recruitment Project Team will partner with the Mayor, Board of Aldermen, and designated staff as your technical advisor to ensure that the recruitment process for your next City Administrator is conducted in a thorough and professional manner. Our objective is to generate high-quality candidates and assist you with the screening and evaluation of these candidates.

We have structured the W&C Recruitment Project Team to draw upon W&C's and Springsted's 50-plus years of service to the public sector and to leverage W&C's experience and capacity to focus nationwide to find the most qualified candidates.

Physical Address

Waters & Company, *a Springsted Company*
9229 Ward Parkway, Suite 104
Kansas City, Missouri 64114

Office: 816-333-7200
Fax: 816-333-7299

Respectfully submitted,

Rollie Waters, Executive Vice President
Consultant

II. Response to Scope of Work

Task I: Recruitment Brochure Development and Advertising

The development of a comprehensive recruitment brochure that includes a profile of the ideal candidate is an important first step in the recruitment process. This profile includes the required academic training, professional experience, leadership, management and personal characteristics related to the success of the candidate in the position of City Administrator. The recruitment brochure will also have a profile that captures the essence of the City as a highly-attractive venue for the successful candidate to live and work.

To prepare the recruitment brochure, the Recruitment Project Team Leader will come on site to meet with the Mayor, Board of Aldermen, and designated staff to discuss the required background, professional experience and management and leadership characteristics for your City Administrator position. We meet individually (or collectively depending upon your preference) with the Mayor and Board of Aldermen to broaden our understanding of the position's leadership and management requirements, current issues, strategic priorities and to identify expectations for the City Administrator. [See example of a recruitment brochure in Appendix I.]

The Recruitment Project Team will also work with the City of Raytown to develop an advertising and marketing strategy to notify potential candidates about the vacancy and conduct an open recruitment that encourages applications from a talented and diverse pool of candidates. Our Team will place ads in appropriate professional publications, websites and local print media, if required. Additionally, W&C has a highly-accessed website that has a special location attracting many potential candidates to upload their resumes. The aggressive advertising and marketing campaign for top talent will include national, state, regional and local elements as determined during our initial meetings with the City's representatives. Our customized mailing list, selected from our extensive database and contacts collected at appropriate public sector conferences, will be utilized to further promote the position.

Advertisements for the City Administrator position could be placed with:
International City/County Management Association
National Forum of Black Public Administrators & Hispanic Forum
Careers in Government (careersingovernment.com)
Missouri Municipal League
Other municipal league websites in adjacent states such as KS, IA, etc.
Waters & Company has access to numerous websites and listservs specific to universities and their alumni, regional councils of government, and contact lists throughout the Midwest & Nationwide.

Project Milestone	Deliverables	Proposed Date
Position profile and recruitment brochure development.	• Onsite discussions with City officials to develop a candidate profile. • W&C will receive information regarding the City's budgets, organizational charts, images, logos, etc. • Develop draft documents (Recruitment Brochure, Advertisement, Marketing Letter and Timeline).	Approx. 2 Weeks (Following first visit)
Approve brochure, commence advertising and distribute marketing letter.	• Brochure sent to the City for final approval. • Commence advertising and distribution of recruitment brochure.	End of 2nd Week

Task II: Execution of Recruitment Strategy and Identification of Quality Candidates

Utilizing the information developed in Task I, W&C will identify and reach out to individuals who will be outstanding candidates for the position of City Administrator. Often, well-qualified candidates are not actively seeking new employment and will not necessarily respond to an advertisement. However, if a potential candidate is presented with the opportunity directly and in the proper manner, he or she may apply. We take pride in our ability to locate highly qualified candidates across the nation based on the professional contacts and relationships we have developed and maintained over many years.

These efforts will be supplemented by the creation of an appropriate database utilizing our extensive, interactive applicant database for the City Administrator position. This will provide the W&C Team with the ability to customize applicant flow and tracking, communication with applicants and conduct database inquiries for candidates based on characteristics important to the City such as geographic location, particular experience, expertise and credentials.

During this part of the process the Recruitment Project Team will work with the Mayor, Board of Aldermen and designated staff to reach consensus on the leadership and management style for the ideal candidate. Our research will determine the key competencies, work values and leadership/management style for the position and match the candidates to each attribute. Each candidate submitting a resume is sent a timely acknowledgement by our Team, including an approximate schedule for the recruitment. Throughout the recruitment process, communications are maintained with each candidate regarding information about the recruitment progress and their status in the process. We take pride in the many complimentary comments made by candidates regarding the level of communication and the professional manner in which they are treated during our recruitments.

Project Milestone	Deliverables	Proposed Date
Execution of recruitment strategy and candidate outreach.	• Online data collection and profile development. • Development of interactive searchable applicant database for recruitment of the City Administrator. • W&C performs direct outreach to prospective candidates identified in the recruitment strategy. • Utilization of extensive applicant database to identify applications and review applicant pool for competencies/demographics.	Approximately 30 – 45 Days

Task III: Screening of Applicants and Recommendation of Semi-Finalists

In Task III the Recruitment Project Team, under the direction of Art Davis, will screen the candidates against the criteria within the position and candidate profiles and develop a list of semi-finalists for recommendation to the Mayor and Board of Aldermen.

The most promising applicants will receive a candidate essay questionnaire to complete that will provide additional information about the candidates' background and experience. We will then narrow the list to a group of 10-15 semifinalists for your review and to select finalists.

Another unique aspect of our recruitment process is our use of online recorded interviews for the screening process. Responses are timed and questions are not provided in advance. This tool allows our Team to

develop a more comprehensive understanding of the candidate's ability to think "on their feet" as well as their personal and professional demeanor. This virtual interview can be scored by individual selection team members as well as the consulting team for later review and comparison.

Our Team will provide an online link for the Mayor, Board of Aldermen and others designated, who have input into the hiring decision, allowing them to review and rate the recorded video responses. This provides the organization with additional candidate assessments that can be customized to fit the unique needs of your City.

Project Milestone	Deliverables	Proposed Date
Applicant screening and recommendation of semi-finalists.	• W&C compares applications to the approved candidate profile developed in our searchable applicant database. • W&C develops customized candidate questionnaire & due diligence questionnaire to provide to applicants who most closely meet the candidate profile. • Top 10-15 candidates identified as semi-finalists. • Semi-Final Report is prepared, including the brochure, master applicant list, cover letter, resume and completed questionnaire of candidates to be considered. • W&C and the City review and rate video interviews. • W&C sends links to City to review the aggregate responses and ratings. • Semi-finalists complete candidate management style assessment, responses are reviewed and interview questions are developed. • Recruitment Project Team Leader meets with Mayor and Board of Aldermen to review recommended semi-finalists. Mayor and BOA select finalists for on-site interviews.	Approximately 10 days

Task IV: Conducting Background Checks, Reference Checks and Academic Verifications

When the Mayor and Board of Aldermen approve of a group of finalists for on-site interviews, W&C will begin the process of conducting reference checks, background checks and academic verifications. A Confidential Reference Report is prepared for each finalist to complete our understanding of his/her management and leadership characteristics and professional work performance.

For the background checks, W&C will develop information on the candidates in the following areas:

- Consumer Credit
- City/County Criminal
- City/County Civil Litigation
- Judgment/Tax Lien
- Motor Vehicle
- Bankruptcy
- State District Superior Court Criminal
- State District Superior Court Civil Litigation
- Federal District Criminal
- Federal District Civil Litigation

To ensure that our quality standards are maintained, we require a minimum of ten business days between the time that you select the finalists for on-site interviews and when we submit the candidate documentation for your final interview process.

Project Milestone	Deliverables	Proposed Date
Finalists complete supplemental work products.	• Finalists complete narrative of their two most significant professional achievements and a critical problem analysis.	*(10 Working Days – same as background and reference checks below)*
Design final process with Board of Aldermen for on-site interviews with finalists.	• W&C confirms interviews with candidates. • Travel logistics are scheduled for the candidates.	*(10 Working Days – same as background and reference checks below)*
Background checks, reference checks and academic verification.	• W&C completes background checks, reference checks and academic verifications for finalists.	10 Working Days

Task V: Final Interview Process

Upon completion of Task IV, we will work with you to develop the final interview process. We will provide documentation on each of the finalists which will provide the highlights of their professional experience and leadership/management profile (Gap Analysis) as well as a summary of the results of the reference checks, background checks and academic verifications. In addition, the Final Report will include guidelines for interviewing the candidates, suggested interview questions and a candidate assessment process for your interview panel(s).

The Recruitment Project Team Leader will be available during the final interview process to answer questions about the candidates and, if requested, assist with the final evaluation of the candidates. In addition, if the City requests the service, we will assist you with the development of a compensation package and related employment considerations and assist with the negotiation of an employment agreement.

Project Milestone	Deliverables	Proposed Date
Final Report prepared and delivered to City.	• Final Report is prepared, including brochure, interview schedule, cover letter, resume, candidate questionnaire, two examples of candidates' most significant professional achievements, suggested interview questions, candidate assessment form and management style probing questions.	September 7 – 8
On-site interviews with finalists.	• Interviews are scheduled. • Recruitment Project Team Leader attends client interviews and is available to answer questions during deliberations of candidates.	September 14 – 16
Offer made / accepted.	• If requested, W&C participates in candidate employment agreement negotiations. • W&C notifies candidates of decision. • W&C confirms final process close out items with the City of Raytown.	Week of September 19

Strategy for Recruitment of Diverse Candidates

Our corporate core values and work environment reflect our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. We have established strong and credible networks with minority and female leaders nationwide. In addition, we are corporate members of the National Forum for Black Public Administrators (NFBPA) and the Hispanic Network and are on their National Corporate Advisory Council. We participate in their membership events on a regular basis.

To that end, we take responsibility for diversity in our organization, our recruitment strategy and our candidate pools. In this recruitment, we will use our established networks to make direct and personal contacts with prospective minority and female candidates and encourage them to consider the City of Raytown's City Administrator position. Because of our performance record in presenting a diverse applicant pool, these prospective candidates know they will be fairly considered in the process.

Waters & Company, *a Springsted Company*, is committed to ensuring equitable participation in our business and employment opportunities without regard to race, color, religion, sex, national origin, age, disability, veteran status, marital status or sexual orientation. As a leader in the executive recruitment industry, we take positive actions to prevent and to remedy any discriminatory effects of business and employment practices.

Springsted Incorporated, our parent company, is a WBE.

Timeline

Below is an estimated Timeline for the executive recruitment process. You will be asked during the first on-site meeting to review and approve a Timeline for the recruitment project. It is our intent to conduct the recruitment expeditiously, but not at the expense of finding high-quality candidates for you.

CITY OF RAYTOWN, MO EXECUTIVE RECRUITMENT PRELIMINARY TIMELINE		
The following Timeline represents a preliminary schedule for your executive recruitment based on a commencement date of Tuesday, June 28 *(commencement of process is contingent upon contract approval)*. Actual target dates will be developed in consultation with and approved by the Mayor and Board of Aldermen.		
Project Milestone	Deliverables	Target Date
Profile development, advertising and candidate outreach.	• W&C completes on-site interviews to develop candidate profile and recruitment brochure; the City approves ad placement schedule and timeline. • W&C sends draft recruitment brochure to the City. • The City returns draft recruitment brochure (with edits) to W&C. • W&C commences executive recruitment advertising and marketing Week of July 11 • Online data collection and profile development • First review deadline occurs on Aug. 12	June 28 – Aug. 12
Applicant screening and assessment and recommendation of semi-finalists.	• W&C commences formal review of applications and sends most promising applicants a Candidate Questionnaire to provide additional information about background and experience. Candidates complete recorded interview online. • W&C completes formal review of applications and sends selected resumes and questionnaire responses to the City for review. Also candidates' recorded interviews are presented. • Semi-finalists complete candidate management style assessment and responses are reviewed and interview questions are developed. • W&C meets with the Mayor and BOA on Tuesday, Aug. 23 and recommends semi-finalists; the City selects finalists for on-site interviews.	August 15 – 23
Comprehensive background check and reference checks completed for finalists.	• W&C completes reference checks/background checks/ academic verification on finalists. *(Minimum of 10 working days required for reference/background checks)*	Aug. 24 – Sept. 6
On-site Interviews with finalists.	• W&C sends documentation and materials on finalists to City on Sept. 7. • The City conducts on-site interviews.	September 14 – 16
Employment offer made / accepted.	• The City extends employment offer to selected candidate.	Week of Sept. 19

III. Proposed Costs

The all-inclusive professional fee to conduct the recruitment is provided below and includes the cost of professional services by the Recruitment Project Team Leader, the project support staff and all project-related expenses such as advertising, preparation of the recruitment brochure, printing, candidate background, reference and academic verification checks and travel expenses for on-site visits. Travel expenses incurred by candidates for on-site interviews with the client are not the responsibility of W&C and are handled directly by the client organization.

The all-inclusive professional fee will be billed in four installments: 30% of the fee will be billed at the beginning of the recruitment; 30% at the implementation of Phase I; 30% at the implementation of Phase II; and 10% upon acceptance of an offer by the candidate. We are open to negotiate an alternative payment schedule if selected for this recruitment.

If candidates from this recruitment process are selected for another position within your organization within one year of the close of the recruitment, a fee of 50% of the following proposal amount will be due to Waters & Company, *a Springsted Company*.

All questions regarding the professional fees and project-related expenses should be directed to Art Davis, Senior Vice President at adavis@waters-company.com or via phone at 816-868-7042.

PHASE	DESCRIPTION OF PROFESSIONAL SERVICES	FEES
Phase I	Task 1 – Candidate Profile Development/Advertising/Marketing (includes one day on site by Recruitment Project Team Leader) Task 2 – Identify Quality Candidates	
Phase II	Task 3 – Screening of Applications and Submission of Recommended Semi-Finalists to Client (includes one day on site by the Recruitment Project Team Leader) Task 4 – Reference Checks, Background Checks and Academic Verifications	
Phase III	Task 5 – Final Process/On-Site Interviews with Finalists (includes two days on site by Project Team Leader)	
Conclusion	Acceptance of offer by candidate	
	TOTAL ALL-INCLUSIVE PROFESSIONAL FEE	*$24,500*

OPTIONAL SERVICES FOR CONSIDERATION	*FEES*
On rare occasions, W&C is asked to provide additional search services that are not included in this scope of service or to provide more than three on-site visits to the City. Additional work specifically requested by the City which is outside of the scope of this project will be invoiced at the hourly rate of $220 plus expenses. W&C will submit a written explanation of the additional services to be provided and the estimated hours that will be required prior to commencing any additional services.	*$220* per hour plus expenses

Triple Guarantee

Our Triple Guarantee is defined as: (1) A commitment to remain with the recruitment assignment until you have made an appointment for the fees and tasks quoted in this proposal. If you are unable to make a selection from the initial group of finalists, W&C will work to identify a supplemental group until you find a candidate to hire. (2) Your executive recruitment is guaranteed for 24 months against termination or resignation for any reason. The replacement recruitment will be repeated with no additional professional fee, but only for project-related expenses. Candidates appointed from within your organization do not qualify for this guarantee. This guarantee is subject to further limitations and restrictions of your state laws. (3) W&C will not directly solicit any candidates selected under this contract for any other position while the candidate is employed with your organization.

IV. Firm Experience

References

The Recruitment Project Team Leader for this project is Art Davis. He was the owner of a small executive recruitment consulting firm for 10 years when he was hired by Waters & Company on September 1, 2015. Mr. Davis is currently working on a number of executive recruitments at various stages of completion for Waters & Company and four (4) recently completed clients are listed as references below. Mr. Davis also listed three (3) communities as references where he successfully conducted executive recruitments in recent years prior to starting with Waters & Company, and will provide additional references if requested.

References for Art Davis, Recruitment Project Team Leader

City of Grand Rapids, MI (Serving a Population of 210,000) 2016

Project: ***Recruitment for Fire Chief*** ***(Recruitment Completed in May)***
Contact: ***Ms. Mari Beth Jelks, Managing Director of Administrative Services***
Email: mjelks@grand-rapids.mi.us
Phone: *(616) 456-4058*

Lancaster County, SC (Serving a Population of 90,000) 2016

Project: ***Recruitment for Director of Economic Development*** ***(Recruitment Completed in May)***
Contact: ***Mr. John Weaver, County Attorney***
Email: jweaver@lancastercountysc.net
Phone: *(843) 222-0863*

Pinellas County, FL (Serving a Population of 929,048) 2015-2016

Project: ***Recruitment for Director of Human Resources*** ***(Recruitment Completed in April)***
Contact: ***Mr. Mark Woodard, County Administrator***
Phone: *(727) 464-348*
Email: mwoodard@pinellascounty.org

Note: *(727) 453-3089 (This is the direct phone number for Ms. Della Klug, Senior Executive Assistant to the County Administrator; email address: dklug@pinellascounty.org. Please copy Ms. Klug if an email is sent and she will make sure it is presented to Mr. Woodard, or call Ms. Klug directly to identify the best way to make contact with the County Administrator)*

WaterOne, KS (Johnson Co. Water District No. 1 – Serving a Population of 400,000) 2015-2016

Project: ***Recruitment for Human Resources Director*** ***(Recruitment Completed in February)***
Contact: *Mr. Mike Armstrong, General Manager / CEO*
Phone: *913-895-5517*
Email: marmstrong@waterone.org

References for Art Davis, Recruitment Project Team Leader - Prior to September 2015:

City of Lansing, Kansas (11,642) 2015

Project: ***Recruitment for City Administrator***
Contact: *Mayor Gene Kirby*
Phone: *913-240-9873*
Email: mayor@lansing.ks.us

City of Blue Springs, Missouri (50,000) 2014

Project: ***Recruitment for City Attorney*** *(Prior Recruitments: Director of Parks & Recreation)*
Contact: *Mayor Carson Ross*
Phone: *816-655-0499*
Email: cross@bluespringsgov.com

City of Independence, Missouri (118,000) 2014

Project: ***Recruitment For Finance Director*** *(Prior Recruitments: Police Chief, Community Dev. Dir. and others)*
Contact: *Ms. Debra Craig, Director of Human Resources*
Phone: *816-325-7385*
Email: dcraig@indepmo.org

Experience

The following is a partial list of previous Executive Recruitments:

List of Relevant Executive Recruitments: 2011 to Present				
Year	Client	State	Recruitment	Population
2011	Altus	OK	City Administrator	19,591
2011	Ashland	OR	Assistant City Administrator	20,713
2011	Carrboro	NC	Town Manager	20,433
2011	Christiansburg	VA	Town Manager	21,041
2011	Decorah	IA	City Administrator	8,172
2011	Dumfries	VA	Town Manager	4,937
2011	Elk River	MN	City Administrator	23,447
2011	Fredericksburg	TX	City Mgr	10,829
2011	Gardner	KS	City Administrator	20,473
2011	Grain Valley	KS	City Administrator	13,125
2011	Manassas	VA	City Manager	41,705
2011	Mesa	AZ	Deputy City Manager	457,587
2011	Osceola	WI	Village Administrator	2,421
2011	Petersburg	VA	City Manager	33,740
2011	Sachse	TX	City Manager	22,026
2011	Salisbury	NC	City Manager	33,604
2011	Socorro	TX	City Manager	32,517
2011	St. Anthony	MN	City Administrator	8,583

List of Relevant Executive Recruitments: 2011 to Present				
Year	Client	State	Recruitment	Population
2011	Virginia Beach	VA	Deputy City Manager	448,479
2011	Willmar	MN	City Administrator	19,680
2012	Albertville	MN	City Administrator	7,230
2012	Brainerd	MN	City Administrator	13,487
2012	Charlotte	NC	City Manager	792,862
2012	Eau Claire	WI	City Manager	61,704
2012	Exmore	VA	Town Manager	1,458
2012	Fairview	TX	Town Manager	8,148
2012	Martinsville	VA	City Manager	15,416
2012	Morehead City	NC	City Manager	9,203
2012	Ocean City	MD	Town Manager	7,092
2012	Rockville	MD	City Manager	47,388
2012	Scandia	MN	City Administrator	3,936
2012	Sun Prairie	WI	City Administrator	29,364
2012	Thief River Falls	MN	City Administrator	8,661
2012	Winchester	VA	City Manager	27,216
2012	Windsor Heights	IA	City Administrator	4,860
2013	Alexandria	MN	City Administrator	11,580
2013	Bayport	MN	City Administrator	3,496
2013	Belle Plaine	MN	City Administrator	6,838
2013	Bellevue	WI	Village Administrator	14,570
2013	Burnsville	MN	City Manager	61,434
2013	Clinton	NC	City Manager	8,676
2013	East Grand Forks	MN	City Administrator	8,602
2013	International Falls	MN	City Administrator	6,357
2013	Irving	TX	City Manager	228,653
2013	Justin	TX	City Manager	3,333
2013	Manassas	VA	Director of Finance and Admin.	41,705
2013	Montgomery	MN	City Administrator	2,933
2013	Moose Lake	MN	City Administrator	2,787
2013	Muskegon	MI	City Manager	37,213
2013	Newport News	VA	City Manager	179,611
2013	Norwood Young America	MN	City Administrator	3,583
2013	Raleigh	NC	City Manager	423,179
2013	Sherburn	MN	City Administrator	1,128
2013	Watertown	MN	City Administrator	4,239
2013	West Saint Paul	MN	City Manager	19,708
2014	Atlantic Beach	FL	City Manager	12,864
2014	Belle Plaine	MN	City Administrator	6,838
2014	Bloomington	MN	City Manager	86,319
2014	Boone	NC	Town Manager	17,774
2014	Cape Charles	VA	Town Manager	990
2014	Castle Rock	CO	Town Manager	53,063
2014	Eustis	FL	City Manager	19,214
2014	Hutchinson	MN	City Administrator	13,871
2014	Irving	TX	City Manager	225,427
2014	Lakeville	MN	City Administrator	58,562
2014	Lexington	VA	City Manager	6,998
2014	Midlothian	TX	City Manager	19,891

List of Relevant Executive Recruitments: 2011 to Present				
Year	Client	State	Recruitment	Population
2014	Narberth Borough	PA	Borough Manager	4,295
2014	Novi	MI	City Manager	123,099
2014	Oakdale	MN	City Administrator	27,780
2014	Springfield	MN	City Manager	2,114
2014	Township of Lower Merion	PA	Township Manager	59,850
2015	Bemidji	MN	City Manager	14,435
2015	Big Lake	MN	City Administrator	10,298
2015	Brooklyn Park	MN	City Manager	78,373
2015	Coon Rapids	MN	City Manager	62,103
2015	Cottage Grove	MN	City Manager	35,399
2015	Davidson	NC	Town Manager	11,750
2015	Diboll	TX	City Manager	5,323
2015	Fairfield County	SC	County Administrator	23,109
2015	Golden Valley	MN	City Manager	20,845
2015	Grand Junction	CO	City Manager	59,778
2015	Kingsville	TX	City Manager	26,312
2015	Manassas	VA	Deputy City Manager	41,705
2015	Monument	CO	Town Manager	5,817
2015	Provincetown	MA	Town Manager	2,994
2015	Sachse	TX	City Manager	22,026
2015	Scandia	MN	City Administrator	3,936
2015	Shakopee	MN	City Administrator	39,167
2015	Socorro	TX	City Manager	32,517
2015	Virginia Beach	VA	City Manager	448,479
2015	Warrenton	VA	Town Manager	9,862
2015	West Jordan	UT	City Manager	110,077
2015	Westminster	CO	City Manager	109,169
2015	Williamsburg	VA	City Manager	15,206
2016	Fredericksburg	VA	City Manager	28,132
2016	Greensboro	NC	Assistant City Manager	279,639
2016	Hayden	CO	Town Manager	1,801
2016	Medford	OR	City Manager	77,677
2016	Moose Lake	MN	City Administrator	2,787
2016	Wayzata	MN	City Manager	4,217
In Progress	Cary	NC	Town Manager	151,088
In Progress	Charter Township of Kalamazoo	MI	Township Manager	20,918
In Progress	Christiansburg	VA	Town Manager	21,533
In Progress	Circle Pines	MN	City Administrator	4,953
In Progress	Deerfield Beach	FL	Assistant City Manager	78,041
In Progress	Farmers Branch	TX	City Manager	31,664
In Progress	Norwalk	IA	City Manager	9,639
In Progress	Virginia	MN	City Administrator	8,661
In Progress	Warsaw	VA	Town Manager	1,498
In Progress	Williamsburg	VA	Assistant City Manager	15,206

V. Recruitment Project Team

Mr. Rollie Waters, Executive Vice President
Direct Phone: (214) 466-2424
Email: rwaters@waters-company.com

Recruitment Project Team Leader
Mr. Art Davis, Senior Vice President
Direct Phone: (816) 868-7042
Email: adavis@waters-company.com

Mr. Chuck Anderson, Senior Vice President
Direct Phone: (817) 965-3911
Email: canderson@waters-company.com

Ms. Jenelle Stapleton, Project Coordinator
Direct Phone: (214) 466-2445
Email: jstapleton@waters-company.com

Rollie Waters
Executive Vice President

Rollie O. Waters is an Executive Vice President of Waters & Company, *a Springsted Company*. Since 1976, Rollie has been a management consultant to private and public sector clients. He has consulted with national and international clients in the area of HR Management system design and strategic management. He has given various lectures and seminars for organizations in the areas of compensation as it relates to performance management. He is viewed on a national level as one of the foremost authorities in succession planning and performance management system design for the public sector. He has spoken before such organizations as the International City/County Managers Association, American Management Association, The Alliance for Innovation, Southern Methodist University, the University of Maryland, National Forum of Black Public Administrators, California Institute of Technology, the Texas Municipal League (TML), the International Personnel Management Association (IPMA-HR), several international companies in Great Britain and various other U.S. public and private sector agencies and organizations.

Rollie has been actively involved in the development of competency-based knowledge selection and development tools over the past twenty years. He has been instrumental in ensuring the proprietary profiles that he has designed attract the right candidates that fit the organization's needs. In addition, Rollie's extensive knowledge of performance management solidifies matching the management style most compatible with the organization's success. His research on succession planning has led him and his team to be able to help shape the future of organizations through their executive recruitment activities.

Rollie has been widely published in national journals and magazines focusing on human resource challenges. His publications include a research article in the Public Personnel Management Journal titled "The Impact of Behavioral Traits on Performance Appraisal." Prior to founding W&C, Rollie held an executive position with Dun & Bradstreet Co., Inc., and a management position with Owens Corning Fiberglass.

Areas of Expertise

- Executive Recruitment
- Web-based Compensation Support
- Management Development
- Organizational Strategy
- Mentoring Programs
- Performance Management
- Competency-based Systems and Development Systems
- Succession Planning

Professional Accomplishments and Education

Rollie is a member of Mensa, a Strategic Partner with the International City/County Managers Association, International Management Consultants, Alliance for Innovation, a member of the National Corporation Advisory Council of the National Forum for Black Public Administrators and numerous other professional groups. He has also appeared in several professional directories such as Who's Who in the World, Who's Who in Finance and History, and many others. Rollie has an extensive background in the behavioral sciences and strategic planning. He received his MBA at Pepperdine University and his Bachelor of Science degree in Psychology from the University of South Carolina. In addition, he is a Certified Management Consultant (CMC); CMC is a certification mark awarded by the Institute of Management Consultants USA and represents evidence of the highest standards in consulting and adherence to the ethical canons of the profession.

Arthur (Art) Davis
Senior Vice President

Arthur (Art) Davis is a Senior Vice President of Waters & Company, a *Springsted Company*. Prior to joining Waters & Co., Art successfully started and expanded his own company for 10 years providing executive recruitment and organizational management consulting services for cities, counties and nonprofits.

Prior to consulting, Art was Associate Director for the Civic Council of Greater Kansas City, a nonprofit 501c4 membership organization of CEOs representing some of the largest companies in the region. One of his responsibilities was to organize efforts to revitalize Downtown Kansas City, Missouri by coordinating a strategic and master planning process involving hundreds of stakeholders, resulting in development of strategies, solicitation of start-up funding and implementation of action plans – all contributing toward the successful revitalization of Downtown Kansas City.

For nearly six years Art served as City Administrator of Lee's Summit, a city recognized as the "fastest growing" city in Missouri and the Greater Kansas City region at the time. Earlier positions of responsibility include working for the cities of Lenexa, Kansas and Dallas, Texas, at one point serving as Assistant to the Mayor of Dallas.

Areas of Expertise

- Executive Recruitment
- Leadership/Management Development
- Strategic Goal Setting & Strategic Planning
- Organizational Assessment, Design & Development
- Organization & Community Facilitation

Professional Accomplishments and Education

Art received his Bachelor of Arts degree in political science and public administration from William Jewell College and his Masters of Public Administration from the University of Kansas.

Art has led and participated in a wide variety of community initiatives and on nonprofit boards throughout his career. He was presented with the L.P. Cookingham Award by the Greater Kansas City Chapter of the American Society for Public Administration, recognizing his long-term and outstanding contributions in the field of public administration.

Charles (Chuck) Anderson
Senior Vice President

Charles (Chuck) S. Anderson is a Senior Vice President of Waters & Company, *a Springsted Company*. Prior to joining the Waters & Co., Chuck worked for local governments and non-profit organizations, including City Manager for Dallas, Texas; Executive Director for the Dallas Area Rapid Transit (DART) and Executive Director for the Michigan Education Association.

Chuck also served as Director for Local Government Reform for the International City/County Association (ICMA), managing a U.S. government contract for the planning and delivery of technical assistance to local governments in Central and Eastern Europe. His last assignment in this role with ICMA was to recruit and supervise a team of technical consultants to assist in re-building local governments in Bosnia following agreement on the Dayton Accords.

During his service with the Michigan Education Association, Chuck also served as Senior Consultant for Urban Planning and Management for Michigan State University's Institute for Public Policy and Social Research.

Areas of Expertise

- Executive Recruitment
- Leadership/Management Development
- Organizational Design
- Organizational Development

Professional Accomplishments and Education

Chuck received a Bachelor of Arts degree in political science and human resources management and a Masters of Public Administration degree from the University of Kansas. He received the prestigious L.P. Cookingham Award for Development of Young Professionals from the International City/County Management Association (ICMA) and the Minority and Women Advancement Award from the American Public Transit Association (APTA). He was also recognized as Public Administrator of the Year by the American Society of Public Administration (ASPA) and Outstanding Management Innovator (Honorable Mention) by ICMA. Chuck was recognized in 2007 with the Lifetime Achievement Award from his Public Administration Alumni Association at the University of Kansas.

Jenelle Stapleton
Project Coordinator

Jenelle Stapleton is the Project Coordinator at Waters & Company, *a Springsted Company*. She is responsible for supporting the lead consultants throughout the entire scope of the recruiting process, as well as providing administrative support to the Executive Vice President, Rollie Waters.

In this role, Jenelle coordinates communications with candidates, the processes resumes and distributes candidate questionnaires. She is also responsible for providing support to candidates regarding technical and logistic issues. She assists the consultants in scheduling the semifinalist interviews, submitting profiles for background checks and education verification, as well as notifying the finalists of project status. Her responsibilities extend to editing presentations, advertisement placements and general office administration.

Professional Accomplishments and Education

Previously, Jenelle worked in Real Estate Investment as the Operations Manager for a boutique firm in Grapevine, TX. Coordinating between private lenders, executive staff and the operations employees, she provided support and implemented resourcefulness at all levels of the company. For four years prior to this, Jenelle served as the Client Relations Executive for a financial sales company in Fort Worth, TX. Jenelle holds an Associate's Degree in Financial Operations and is currently pursuing her Bachelor's Degree in HR Management.

APPENDIX I
Sample Brochure

norwalk

NOTICEABLY NORWALK.™

THE CITY OF NORWALK, IOWA IS SEEKING AN EXPERIENCED AND VISIONARY LEADER TO SERVE AS ITS...

THE ORGANIZATION

The elected governing body consists of a directly elected Mayor plus a five-member City Council, each position elected at-large for four-year terms. The Governing Body is seeking an experienced, innovative and strategic city manager to lead a growing organization of 52 FT employees and an $18.1 million combined funds annual budget, with the fiscal year beginning July 1 and ending on June 30 each year. Norwalk provides traditional municipal services that include: police, fire and emergency medical, community development, planning, building inspection, and economic development. The City also operates a library; provides parks and recreation services; and maintains and plans for future infrastructure within public works and utility services, including the areas of street maintenance and construction, building and grounds, nuisance abatement and storm water maintenance, water services distribution, and wastewater collection. The City's Administrative Services department consists of finance, utility billing, city clerk, and the city manager's office.

CITY MANAGER

THE COMMUNITY

Incorporated in 1900, Norwalk is a growing and dynamic community of 10,000 residents located just south of Des Moines and has grown 23 percent in the last 10 years. It is quickly earning a reputation for its progressive municipal management, hospitality and small-town charm. Recently voted Businessweek's "Best Affordable Suburb" in Iowa, Norwalk offers easy access to major interstates and highways, short commute times, an abundance of parks and recreational opportunities, and a superb school district.

Norwalk provides traditional municipal services to an area in excess of 11 square miles and is blessed to possess all of the advantages associated with close proximity to Iowa's largest airport, significant cultural and educational amenities - all within 20 minutes of Iow's State Capitol and significant private sector employers. The regional priority is to attract the key industries of Financial Services, Logistics, Bioscience and Data Centers. Norwalk's median income is 45 percent above the state average and higher than the Des Moines Metro, and this "can do" community with a highly desirable and accessible location is poised to attract and support new commercial development. The City is also projecting significant additional retail as a result of the community's rapid growth in rooftops.

Norwalk is a place where families can enjoy the benefits of living in a smaller community with outstanding K-12 public schools, close proximity to higher education institutions such as Drake and Grand View Universities, and access to a multitude of other arts, culture and lifelong learning opportunities throughout Metro Des Moines. City leaders are proud to have developed innovative partnerships with the Norwalk Public School District, where proficiency of its 2,500 plus student enrollment often exceeds 90 percent and is annually recognized as one of Iowa's top 25 schools for advanced placement participation.

THE POSITION

The City Manager is appointed by and serves at the pleasure of a majority of the City Council. Responsibilities include overseeing the appointment of all personnel and the general supervision of departmental operations, including budget preparation and capital improvements planning and implementation. Candidates should possess any combination of education and/or experience that provides the knowledge, skills, and abilities necessary for acceptable job performance. A graduate degree in public administration plus a minimum of 5 years of progressively responsible management experience in local government is preferred. Prior experience as a city manager or as an assistant in a community experiencing growth is desirable. The quality of life offered in Norwalk is outstanding and the City Manager is required to reside within the City's corporate limits. The starting salary, based on the successful candidate's qualifications and experience, will range up to $120,000, plus an assortment of superior benefits such as:

- Relocation assistance up to $5,000
- $400 monthly vehicle allowance
- Medical, Dental, Vision
- Long-term disability coverage 100% paid by City
- Life insurance paid by City is $40,000 (additional coverage may be purchased by employee)
- Iowa Public Employee Retirement System: City contributes 8.93% and employee contributes 5.95%
- ICMA Deferred Compensation: City matches employee contribution up to $50 per month
- Executive personnel receive 48 hours annual administrative leave
- PTO based on years of service

THE COMMUNITY (CONTINUED)

There is something unique going on between the City and the School District as evidenced by winning an international award for "Innovations in Sharing". In the last eight years, dialogue and collaboration has resulted in the joint construction of a City Public Works Department maintenance facility and School District bus maintenance facility resulting in significant annual savings for the City, and a large initial investment and ongoing cost savings for the District by eliminating the need for a separate facility. In addition, both have combined resources to create a "shared" Information Technology Department achieving significant cost efficiencies and numerous operational enhancements. This has prompted additional discussions about future shared projects. This kind of community leadership has inspired tremendous public support, and the prospect of working with an experienced Mayor, City Council, and professional management team provides a great opportunity for the right city manager candidate.

CURRENT ISSUES AND PRIORITIES

The following list of issues and challenges is representative of what the City Manager will encounter in the first six months on the job and is not intended to be all-inclusive.

- **Organizational Development** - The City Manager will be asked to assess the current organizational structure, staffing levels, and existing priorities and identify important future steps required to sustain and enhance quality municipal services.
- **Capital Project Planning, Investment and Implementation** - Evaluate current capital improvement priorities and options to finance and implement projects. Project priorities likely to include short and long-term options for renovating and constructing a municipal swimming pool; needed water infrastructure upgrades, and street re-construction and improvement priorities.
- **Develop Stronger Regional Partnerships** - Work to establish stronger relations and partnerships with regional planning and transportation agencies on issues impacting the community.
- **Establish Goal Setting Process** - Assist the Governing Body in developing a consistent and ongoing process for identifying and agreeing on strategic goals and priorities for the organization and community.

CANDIDATE PROFILE

Prepared in consultation with the Mayor and members of the City Council, the following list of leadership attributes, personal characteristics, and management expertise is desired in the ideal candidate:

- Experience in managing development processes in a growing community,
- Possess the "people skills" necessary to effectively communicate, collaborate and establish strong relations with other governmental agencies including the state of Iowa, Iowa DOT, Warren County, Des Moines area planning and transportation agencies, neighboring cities, Norwalk Community Schools, Norwalk Area Chamber, civic and business leaders, developers and neighborhood groups,
- Confidence and experience to coalesce the Mayor and City Council's vision and goals into an effective and strategic approach to managing long-term priorities,
- Possesses experience and knowledge about municipal operations,
- Entrepreneurial approach to government operations and willingness to embrace and utilize new technologies to improve services,
- Experience in municipal finance and budgeting,
- Ability to problem solve, collaborate and negotiate on behalf of the City,
- Open communication style with a value placed on transparency,
- Outstanding written, oral and presentation communication skills,
- Honest and forthright in recommendations with a track record of integrity,
- Focus on building consensus and working collaboratively,
- Knowledgeable about HR policies and familiarity in dealing with labor groups,
- Ability to evaluate and empower the City's leadership team to sustain and improve its reputation as a "high performance" organization,
- Ability to promote and advocate on behalf of the City,
- Outstanding personal leadership and management skills,
- Visionary yet practical - use of good judgement on issues impacting community,
- Ability to anticipate problems, identify alternative courses of action, prepare proactive recommendations, and to defend and support those recommendations before the City Council,
- Ability to effectively delegate authority and responsibility while maintaining appropriate levels of accountability and operational control,
- Commitment to organization development and growth.

APPLICATION & SELECTION PROCESS

Qualified candidates please submit your resume online by visiting our website at https://waters-company.recruitmenthome.com/postings/881. This position is open until filled; however, interested applicants are strongly encouraged to apply not later than **May 20, 2016**. Following the first review date, resumes will be screened against criteria outlined in this brochure. Final interviews in Norwalk will be offered to those candidates named as finalists by the City, with reference and background checks conducted after receiving candidates' permission.

For more information, please contact:

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Norwalk, Iowa is an Equal Opportunity Employer and values diversity at all levels of its workforce!

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Helping
PUBLIC & PRIVATE SECTOR CLIENTS
manage their HR needs