



# City of Deltona

**CITY COMMISSION WORKSHOP**  
**MONDAY, DECEMBER 15, 2014**  
**5:30 P.M.**

*Mayor*  
John Masiarczyk

*Vice Mayor*  
Nancy Schleicher  
*District 4*

*Commissioners:*

Mitch Honaker  
*District 1*

Webster Barnaby  
*District 2*

Heidi Herzberg  
*District 3*

Brian Soukup  
*District 5*

Chris Nabicht  
*District 6*

*Acting City Manager*  
Dale Baker

**DELTONA COMMISSION CHAMBERS**  
**2345 PROVIDENCE BLVD.**  
**DELTONA, FLORIDA**

**AGENDA**

1. **CALL TO ORDER:**
2. **ROLL CALL – CITY CLERK:**
3. **PLEDGE TO THE FLAG:**  
  
**PUBLIC COMMENTS- Citizen comments limited to items on the agenda and will take place after discussion of each item.**
4. **BUSINESS:**
  - A. **Review and discussion re: Executive Search Firm Selection.**
5. **CITY MANAGER COMMENTS:**
6. **ADJOURNMENT:**

**NOTE:** If any person decides to appeal any decision made by the City Commission with respect to any matter considered at this meeting or hearing, he/she will need a record of the proceedings, and for such purpose he/she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based (F.S. 286.0105).

Individuals with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk, Joyce Raftery 48 hours in advance of the meeting date and time at (386) 878-8500.



## AGENDA MEMO

**TO:** Mayor & City Commission                      **AGENDA DATE:** 12/15/2014  
**FROM:** Dale Baker, Acting City Manager              **AGENDA ITEM:** 4 - A  
**SUBJECT:** Review and discussion re: Executive Search Firm Selection.

**LOCATION:**

N/A

**BACKGROUND:**

An RFP for an Executive Search Firm was posted and five responses were received from Colin Baenziger and Associates, Management Partners, S. Renee Narloch and Associates, The Mercer Group and Waters and Company. The Commission will have scored the proposals received at the workshop prior to this meeting. The Commission will need to come to a consensus on whether or not interviews are desired. If not, award would be made to the highest overall scoring firm. If interviews are required, another meeting would be scheduled for the Commission to come to a consensus on the ranking of the firms.

**ORIGINATING DEPARTMENT:**

City Manager's Office

**SOURCE OF FUNDS:**

General Fund

**COST:**

Not to exceed \$25,000

**REVIEWED BY:**

Purchasing Manager, Acting City Manager

**STAFF RECOMMENDATION PRESENTED BY:**

Dale Baker, Acting City Manager - Recommendation is being made for the Commission to come to a consensus on whether or not they would like interviews with the highest overall scoring firm or if they would like to enter into an agreement with the highest scoring firm.

**POTENTIAL MOTION:**

N/A - For discussion and direction to staff as necessary.

**AGENDA ITEM APPROVED BY:**

**ATTACHMENTS:**

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Dale Baker, Acting City Manager

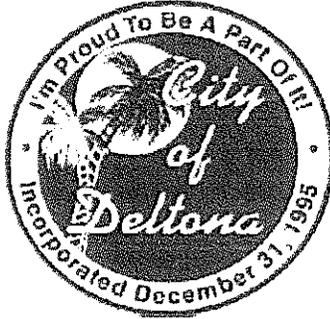
- City Manager Selection Process
- Colin Baenziger and Associates
- Management Partners
- S. Renee Narloch and Associates
- The Mercer Group
- Waters and Company
- Score Sheets

At the Workshop held on August 25, 2015 the Commission discussed the City Manager selection process and concurred that the process would be as follows:

- Staff provides a copy of the RFP to the Commission within the next day or two (2);
- The Commission provides staff any changes to the RFP within three (3) days;
- The RFP will run approximately for 30 days;
- The Commission will review and make a decision the end of September or the first part of October on a consultant and to include in the consultants contract that if the City Manager leaves within the first year of hire that the consultant will repeat the process at no cost to the City;
- Staff will schedule discussions with the consultant at a workshop in October or special meeting if necessary; and
- The consultant will create the advertisement for the position to go out to print after the November election, November 5, 2014.

COLIN BAENZIGER  ASSOCIATES

EXECUTIVE RECRUITING



**EXECUTIVE SEARCH SERVICES TO ASSIST DELTONA WITH THE  
RECRUITMENT OF ITS NEXT CITY MANAGER**

**RFP 15004**

**Volume I: Proposal**

***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](mailto:Colin@cb-asso.com)  
Fax: (888) 635-2430

***...Serving Our Clients with a Personal Touch...***

# PROPOSAL TO FIND THE CITY'S NEXT CITY MANAGER

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COLIN BAENZIGER  ASSOCIATES

EXECUTIVE RECRUITING

November 19, 2014

The Honorable Mayor John Masiarczyk, Sr., Vice Mayor Heidi Herzberg and Commissioners  
 Zenaida Denizac, Webster Barnaby, Nancy Schleicher, Anthony Bellizio and Chris Nabicht  
**ATTN: Kate Krauss, Purchasing Manager**  
 City of Deltona  
 2345 Providence Boulevard  
 Deltona, Florida 32725

Dear Mayor Masiarczyk, Vice Mayor Herzberg and Commissioners Denizac, Barnaby,  
 Schleicher, Bellizio and Nabicht:

Colin Baenziger & Associates (CB&A) appreciates the opportunity to submit a proposal to assist in finding your next City Manager. 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.

While CB&A is a municipal recruiting firm which has conducted assignments across the country, our home base is Florida. In fact, we have been selected to perform 90 of the last 126 recruitments where a Florida city or county has chosen to use a recruiter to find its City or County Manager / Administrator. 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.

CENIERVILLE, MD

DAYTONA BEACH SHORES, FL

RHINELANDER, WI

RICHLAND, WA

SALI LAKE CITY, UT

## COLIN BAENZIGER &amp; ASSOCIATES

EXECUTIVE RECRUITING

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Some of our local searches include City Managers for Cooper City, FL; Dania Beach, FL; Hallandale Beach, FL; Miramar, FL; Melbourne, FL; and Sunrise, FL. We have also found City Managers for Ankeny, IA; Bellevue, WA; Destin, FL; Fayetteville, NC; Medina, WA; Melbourne, FL; Portland, ME; Roanoke, VA; Scottsdale, AZ; and Tacoma, WA. Additionally, we have sought the Borough Manager for Matanuska-Susitna Borough, Alaska (a county the size of West Virginia), County Managers for Alachua County, FL; Brevard County, FL; Clackamas County, OR; Clay County, FL; Polk County, IA; St. Johns County, FL; and Union County, NC.

Our current searches include, among others, the Chief Administrator for El Paso County, TX, as well as City Manager of Delray Beach, FL. We are also conducting searches for the Executive Director of the Central Florida Expressway Authority; a Project Manager for the Government Accounting Standards Board; the Director of the Performing Arts and Convention Center for Federal Way, WA; and Finance Directors for Pasco County, FL and Normandy Park, WA.

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

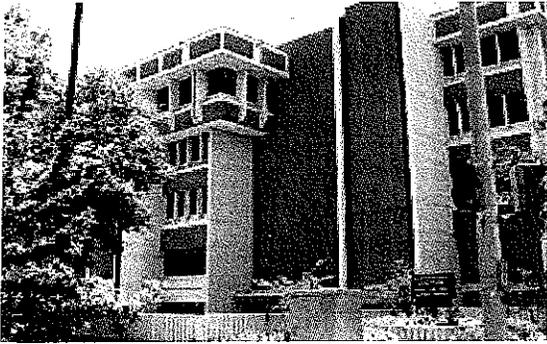
Sincerely,



Colin Baenziger  
Principal / Owner

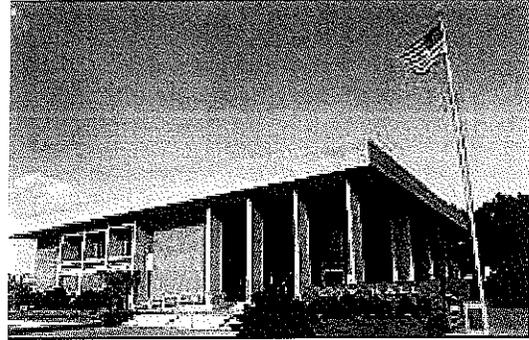
*...Serving Our Clients with a Personal Touch...*

*Some of CB&A Clients...*



*Alachua County, FL*

*Town Manager*



*Titusville, FL*

*City Manager*



*City of Deltona, FL*

*City Manager*



*Sewall's Point, FL*

*Town Manager  
Building Official,  
Police Chief*

## ***I. Qualifications and Experience of the Firm***

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### ***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 Centerville, MD; 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.

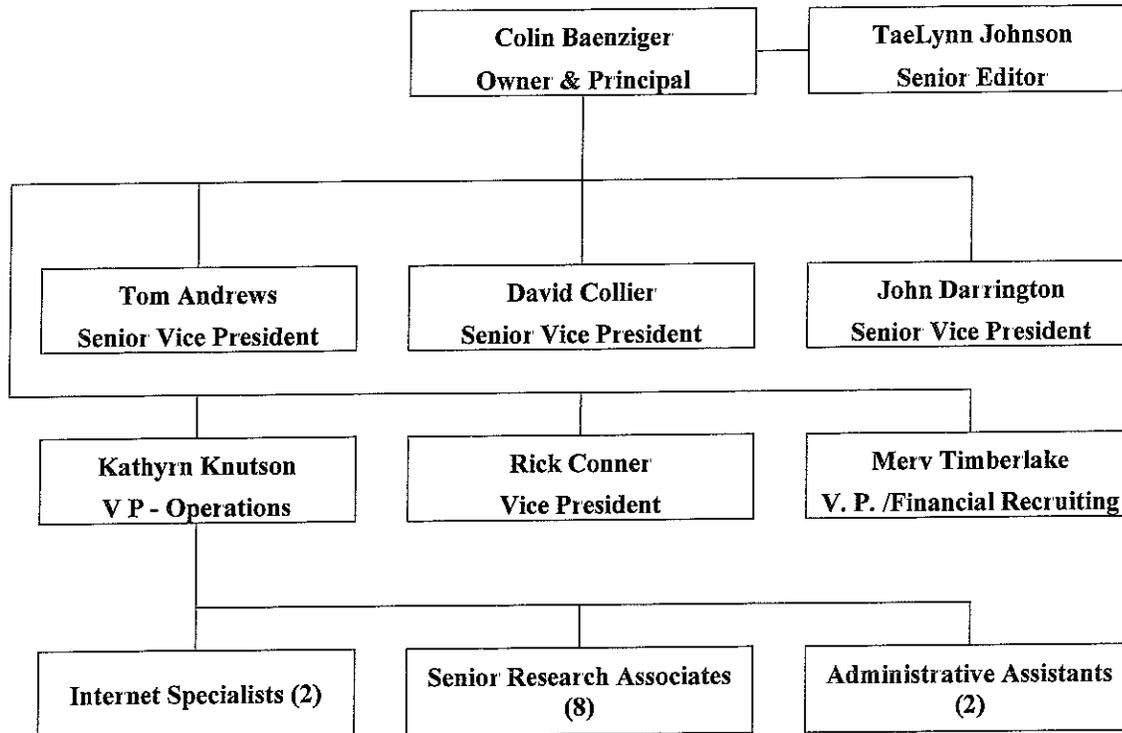
Since beginning our search practice in 1998, we have conducted searches and other related work for clients in nineteen states. Overall our staff has performed over 150 City, County, and Special District Manager searches and approximately 200 local government searches. The basic approach we have presented 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.

## ***I. Qualifications and Experience of the Firm (continued)***

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### ***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.*

## ***I. Qualifications and Experience of the Firm (continued)***

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### ***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. Thus far in 2014, 53% of our City and County Manager placements have been female and/or minorities.

### ***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.

### ***Directly Related Executive Searches since 2010***

The following ten pages provide the City and County Manager / Administrator level searches CB&A has completed since 2010. We have also conducted numerous department director searches. The searches highlighted in light blue are those we conducted for Florida clients.

## I. Qualifications and Experience of the Firm

2014 City / County Manager Searches Completed						
	Position	Client	Population	Placement	Agency Size: Number of Employees	
1	City Manager	Oakland Park, FL	42,800	David Hebert	240	
2	Township Manager	Springettsbury Township, PA	26,700	Kristin Denne	100	
3	County Administrator	James City County, VA	67,000	Bryan Hill	750	
4	City Manager	Titusville, FL	43,900	Steve Larese	478	
5	County Administrator <sup>1</sup>	Emmet County, MI	32,900	Marty Krupa	163	
6	City Manager	Mount Pleasant, MI	26,200	Nancy Ridley	119	
7	City Manager	Winchester, VA	26,900	Eden Freeman	560 (under the City Manager)	
8	City Manager	North Miami, FL	60,600	Aleem Ghany	364	
9	City Manager	Ellensburg, WA	18,300	Jack Akers	128	
10	City Manager	Bellevue, WA	132,000	Brad Miyake	1229	
11	County Administrator	St. Lucie County, FL	277,800	Howard Tipton	583 (under the Administrator)	
12	City Manager	Connell, WA	4,200	Jed Crowther	19 + temp & seasonal	
13	City Manager	Mountlake Terrace, WA	20,200	Arlene Fisher	153	
14	City Manager	Marco Island, FL	13,300	Roger Hernstadt	210	

<sup>1</sup> The actual title is County Controller but under Michigan Law, the duties of a County Controller are the same as those of a County Administrator.

# I. Qualifications and Experience of the Firm (continued)

		2014 City / County Manager Searches Completed (continued)			
	Client	Contact			
		Name	Title	Phone	Email
1	Oakland Park, FL	Shari McCartney	Mayor	(954) 295-0527	ShariM@oaklandparkfl.gov
2	Springettsbury Township, PA	George Dvoryak	Board Chair	(717) 683-4665	gdvoryak@Springettsbury.com
3	James City County, VA	Mary Jones	Board Chair	(757) 871-5977	mary.jones@jamescitycountyva.gov
4	Titusville, FL	Jim Tulley	Mayor	(321) 567-3702	Mayor@titusville.com
5	Emmet County, MI	Jim Tamlin	Board Chair	(231) 622-2433	jtamlyn@emmetcounty.org
6	Mount Pleasant, MI	Kathleen Ling	Commissioner	(989) 773-7823	klng@mt-pleasant.org
7	Winchester, VA	John Willingham	Council President	(540) 931-4655	John.Willingham@winchesterva.gov
8	North Miami, FL	Rene Monestine	City Attorney	(305) 895-9810	rmonestine@northmiamifl.gov
9	Ellensburg, WA	Rich Elliott	Mayor	(509) 962-7221	elliott@ci.ellensburg.wa.us
10	Bellevue, WA	Kevin Wallace	Deputy Mayor	(425) 452-7810	KWallace@bellevuewa.gov
11	St. Lucie County, FL	Dan McIntyre	County Attorney	(772) 462-1420	mcintyred@stlucieco.org
12	Connell, WA	Bruce Blackwell	Mayor	(509) 234-2701	bblackwell@connellwa.org
13	Mountlake Terrace, WA	Scott Hugill	Assistant City Manager	(425) 744-6208	SHugill@ci.mit.wa.us
14	Marco Island, FL	Larry Sacher	Councilor	(239) 588-0112	LSacher@marcocitycouncil.com

# ***I. Qualifications and Experience of the Firm (continued)***

<b>2013 City / County Manager Searches Completed</b>						
	<b>Position</b>	<b>Client</b>	<b>Population</b>	<b>Placement</b>	<b>Agency Size: Number of Employees</b>	
1	City Manager	Elmira, NY	29,000	Kim Middaugh	293	
2	City Manager	Medina, WA	3,000	Michael Sauerwein.	30	
3	City Manager	Leesburg, FL	20,600	Alfred Minner	515	
4	City Manager	Ashland, KY	21,000	Benjamm Bitters	300	
5	City Manager	Fruitland Park, FL	4,100	Gary La Venia	52	
6	Village Manager	Bal Harbour, FL	2,500	Jorge Gonzalez	37	
7	City Manager	Miramar, FL	122,000	Kathleen Woods-Richardson	960	
8	City Manager	Ankeny, IA	45,000	David Jones	210	
9	County Manager	Clackamas County, OR	380,000	Donald Krupp	2300	
10	City Manager	Sunnyside, WA	15,000	Donald Day	95	
11	City Manager	Monroe, NC	36,397	John D'Agostino	750	
12	County Manager	Okaloosa County, FL	170,000	Ernie Padgett	820	
13	City Manager	Normandy Park, WA	6,300	Glenn Akramoff	27	
14	City Manager	Scottsdale, AZ	220,000	Fritz Behring	2423	
15	City Manager	Satellite Beach, FL	10,000	Courtney Barker	120	

## I. Qualifications and Experience of the Firm (continued)

		2013 City / County Manager Searches Completed (continued)			
	Client	Contact			
		Name	Title	Phone	Email
1	Elmura, NY	Susan Skidmore	Mayor	(607) 738-3714	mayor@cityofelmura.net
2	Medina, WA	Michael Luis	Mayor	(425) 233-6400	mluis@medina-wa.gov
3	Leesburg, FL	David Knowles	Mayor	(352) 326-9300	Allstate2@earthlink.net
4	Ashland, KY	Chuck Charles	Mayor	(606) 327-2001	ccharles@ashlandky.org
5	Fruitland Park, FL	Chris Bell	Mayor	(352) 326-4291	cbell@fruitlandpark.org
6	Bal Harbour, FL	Jaime Sanz	Council Member	(786) 427-4154	jsanz@balharbour.org
7	Miramar, FL	Wazir Ishmael	Interim City Manager	954-802-5323	waishmael@ci.miramar.fl.us
8	Ankeny, IA	Gary Lorenz	Mayor	515-371-2141	garyl@ljmd.com
9	Clackamas County, OR	Paul Savas	Commissioner	503-655-8581	psavas@co.clackamas.or.us
10	Sunnyside, WA	James Restucci	Mayor	(509) 643-4343	jrestucci@sunnyside-wa.gov
11	Monroe, NC	Lynn Keziah	Vice Mayor	704-221-2365	lkeziah@monroenc.org
12	Okaloosa County, FL	Don Amunds	Commission Chair	850-585-8012	damunds@co.okaloosa.fl.us
13	Normandy Park, WA	Clarke C. Brant	Mayor	206-248-7603	clarke.brant@ci.normandy-park.wa.us
14	Scottsdale, AZ	Suzanne Klapp	Vice Mayor	480-312-7402	sklapp@scottsdaleaz.gov
15	Satellite Beach, FL	Frank Catino	Mayor	321-223-7700	fcatino@satellitebeach.org

## I. Qualifications and Experience of the Firm (continued)

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	Hallandale Beach, FL	37,100	Renee Crichton	449	
3	County Administrator	Hernando County, FL	172,800	Leonard Sossamon	1,297	
4	City Manager	Yakima, WA	91,000	Anthony O'Rourke	730	
5	Village Manager	North Palm Beach, FL	12,015	Ed Green	279	
6	City Manager	Key West, FL	26,649	Bob Vitas	456	
7	City Manager	Panama City Beach, FL	12,018	Mario Gisbert	250	
8	City Manager	Sarasota, FL	51,917	Tom Barwin	599	
9	City Manager	Fayetteville, NC	208,000	Ted Voorhees	1,500	
10	City Manager	Cocoa Beach, FL	11,200	Robert Majka	234	
11	City Manager	Fort Pierce, FL	41,590	Robert Bradshaw	361	
12	City Manager	Sunrise, FL	4,260	Alan Cohen	1,203	
13	City Manager	Melbourne, FL	75,000	Michael McNeese	927	
14	City Manager	Doraville, GA	8,500	Shawn Gillen	104	

# I. Qualifications and Experience of the Firm (continued)

		2012 City / County Manager Searches Completed (continued)			
	Client	Name	Title	Contact	
				Phone	Email
1	Cape Coral, FL	Rana Erbrick	Council Member	239-574-0437	rerbrick@capecoral.net
2	Hallandale Beach, FL	Joy Cooper	Mayor	(954) 457-1318	jcooper@hallandalebeachfl.gov
3	Hernando County, FL	Cheryl Marsden	Administrative Services Director	(352) 540-6646	CMarsden@co.hernando.fl.us
4	Yakima, WA	Micah Cawley	Mayor	(509) 901-9114	micah_cawley@ci.yakima.wa.us
5	North Palm Beach, FL	David Norris	Council Member	(561) 841-3355	dnorris@village-npb.org
6	Key West, FL	Shirley Freeman	Chair, Citizen's Advisory Committee	(305) 304-1975	shirleyfreemankeywest@gmail.com
7	Panama City Beach, FL	Gale Oberst	Mayor	(850) 235-1541	gobersst@pcb.gov.com
8	Sarasota, FL	Susanne Atwell	Commissioner	(941) 954-4115	Suzanne_Atwell@sarasotagov.com
9	Fayetteville, NC	Jim Arp	Mayor Pro Tem	(910) 728-2569	JArp@ci.fay.nc.us
10	Cocoa Beach, FL	Laurie Kalaghchy	City Clerk	(321) 868-3235	lkalaghchy@cityofcocoa-beach.com
11	Fort Pierce, FL	Anne Satterlee	Communications Manager	(772) 460-2200	asatterlee@city-fpierce.com
12	Sunrise, FL	Kim Kissian	City Attorney	(954) 746-3300	KKissian@sunrisefl.gov
13	Melbourne, FL	Paul Googelman	City Attorney	(321) 608-7200	cityattorney@melbourneflorida.org
14	Doraville, GA	Donna Pittman	Mayor	(678) 328-9181	donna.pittman@Doravillega.us

## I. Qualifications and Experience of the Firm (continued)

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

# I. Qualifications and Experience of the Firm (continued)

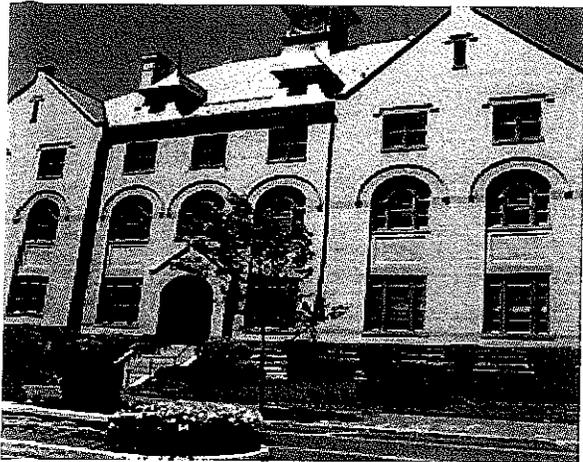
## 2011 City / County Manager Searches Completed (continued)

		Contact			
	Client	Name		Phone	Email
1	Clay County, FL	Travis Cummings	Commission Chair	(904) 529-4701	
2	Orange Park, FL	Sarah Campbell	Town Clerk	(904) 278-3018	scampbell@townop.com
3	Chamblee, GA	Marc Johnson	Interim Manager / Police Chief	(404) 819-9346	chiefmj@chambleepd.com
4	North Port, FL	Jim Blucher	Vice Mayor	(941) 628-2916	jblucher@cityofnorthport.com
5	Matanuska-Susitna, AK	Sonya Conant	Human Resources Director	(907) 746-7432	Sonya.Conant@matugov.us
6	Sunny Isles Beach, FL	Norman Edelcup	Mayor	(305) 792-1701	NSEdelcup@aol.com
7	Albany, GA	Nathan Davis	City Attorney	(229) 431-2805	NDavis@albany.ga.us
8	Portland, ME	Cheryl Leeman	Search Chair / City Council Member	(207) 774-4308	cl@portlandmaine.gov
9	Pinecrest, FL	Guido Inguazo	Village Clerk	(305) 234-2121	inguanzo@pinecrest-fl.gov
10	Yakima, WA	Micah Cawley	Mayor	(509) 901-9114	micah_cawley@ci.yakima.wa.us
11	Polk County, IA	Sue Elliott	Assistant County Administrator	(515) 286-3128	Sue.Elliott@polkcountyiowa.gov
12	Destin, FL	Chuck Garcia	Human Resources Director	(850) 837-4242	cgarcia@cityofdestin.com
13	Madeira Beach, FL	Travis Palladeno	Mayor	(727) 239-5549	tpalladeno@madeirabeachfl.gov
14	Key Biscayne, FL	Conchita Alvarez	Village Clerk	(305) 365-5506	calvarez@keybiscayne.fl.us
15	Tacoma, WA	Joy St. Germain	Human Resources Director	(253) 591-2060	jsgermain@ci.tacoma.wa.us

***I. Qualifications and Experience of the Firm (continued)***

2010 City / County Manager Searches Completed						
	Position	Client	Population	Name of Placement	Agency Size: Number of Employees	
1	City Manager	West Park, FL	12,000	Ajibola Balogun	115	
2	City Manager	Orange City, FL	10,000	Jamie Croteau	98	
3	City Manager	Cape Canaveral, FL	10,200	David Green	95	
4	City Manager	Hallandale Beach, FL	39,000	Mark Antonio	481	
5	County Manager	Union County, NC	198,600	Cindy Coto	1,000	
6	City Manager	Homestead, FL	65,000	George Gretsas	447	
7	City Manager	Fife, WA	8,700	David Zabell	130	

## *More CB&A Clients...*



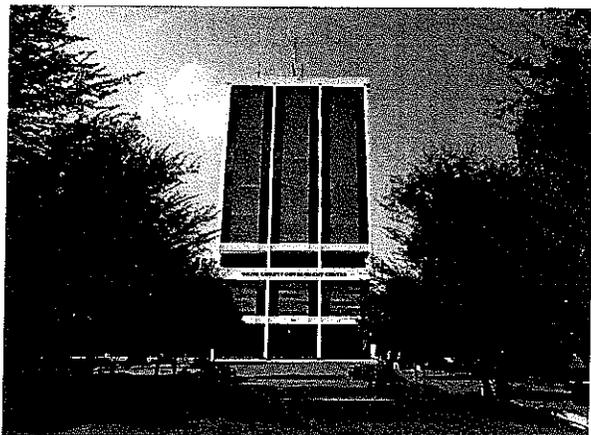
*City of Winchester, VA*

*City Manager*



*City of Destin, FL*

*City Manager*



*Union County, NC*

*County Manager*



*Loudoun County, VA*

*Director – Economic Development  
Human Resources Officer*

## ***II. Proposed Project Staff***

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### ***Project Team and Involvement***

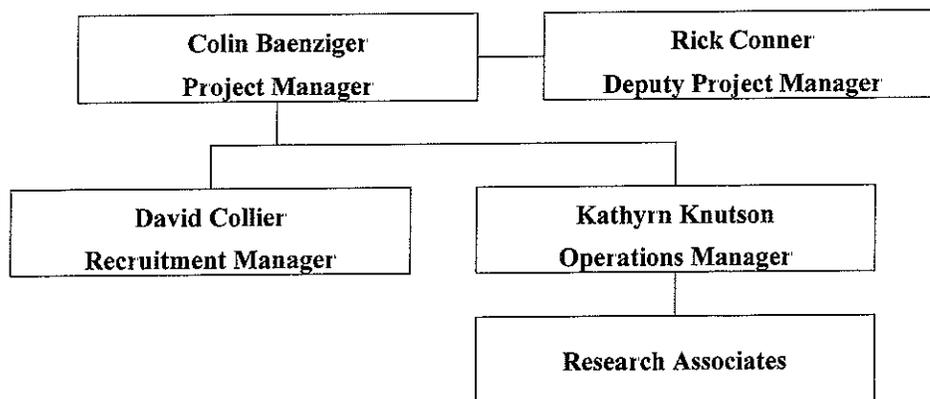
Colin Baenziger & Associates is an experienced recruiting firm which strongly believes that the majority of the search work should be conducted by one knowledgeable person. Colin Baenziger will be that person—he will serve as your project manager. He will conduct the interviews with the elected officials, 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

Rick Conner, Vice President, will serve as deputy project manager. Mr. Baenziger will assist in virtually every aspect of the search effort but will focus on the search for strong candidates and candidate evaluation. 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.

David Collier, senior vice president, will serve as the recruitment manager and assist with the identification and screening of candidates. 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.

Tom Andrews, Senior Vice President, will serve as deputy recruitment manager. Before joining the firm in 2008 as a recruiter, Mr. Andrews served as County Administrator for Fulton County, Georgia, and in high level county and state positions in Maryland for more than 40 years.

Kathryn Knutson, 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.



All of the above staff have the time available that will be needed to do an outstanding job on this recruitment.

## ***II. Proposed Project Staff (continued)***

### ***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.

## ***II. Proposed Project Staff (continued)***

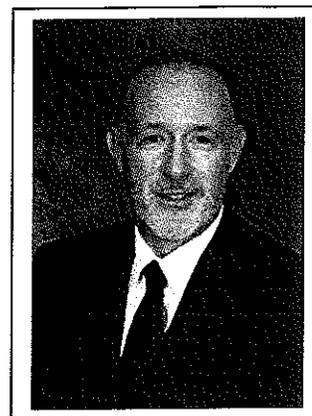
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### ***Rick Conner, P.E.***

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**Vice President**

Rick Conner is a recent addition to CB&A's staff and its 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 including:

- 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.

## ***II. Proposed Project Staff (continued)***

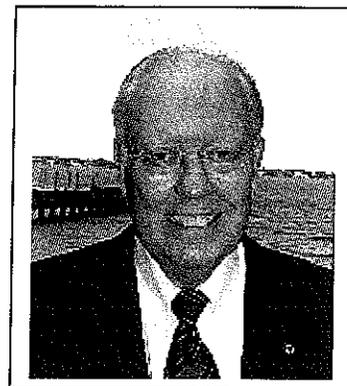
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### ***Dave Collier, M.P.A.***

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#### **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 Tamatec, 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 emphasize 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.

## ***II. Proposed Project Staff (continued)***

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### ***Kathryn Knutson***

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#### **Vice President for Operations**

Ms. Knutson 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.



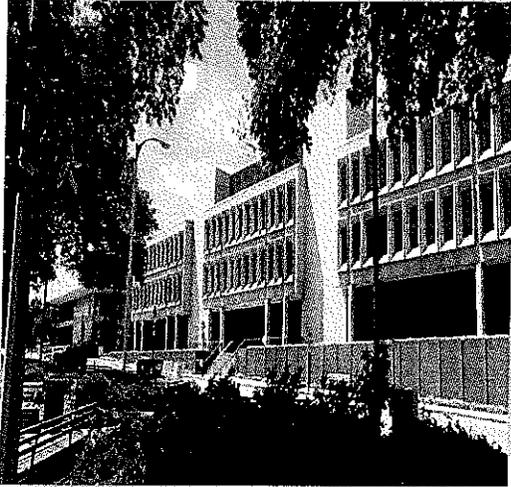
Since beginning her working relationship as a subcontractor with Colin Baenziger & Associates, Ms. Knutson has been involved in virtually every executive search the firm has conducted. Some of the more notable searches include:

- Public Works Director, Chandler, AZ (population 250,000)
- City Manager, Town of Bay Harbor Islands (population 5,200)
- City Manager, Coral Gables, FL (population 42,000)
- City Manager, Cottonwood Heights, UT (population 34,000)
- City Manager, Cutler Bay, FL (population 35,000)
- City Manager, Fife, WA (population 8,200)
- City Manager, Greensboro, NC (population 259,000)
- City Manager, Homestead, FL (population 59,800)
- Village Manager, Key Biscayne, FL (population 11,000)
- City Manager, City of Marathon, FL (population 11,500)
- Village Manager, Village of Palmetto Bay, FL (population 24,000)
- City Manager, Portland, ME (65,000)
- City Manager, Roanoke, VA (population 96,000)
- City Manager, City of West Melbourne, FL (population 15,000)

As noted, a major part of Ms. Knutson's work has been on special projects. For example, she is responsible for the firm's annual City Manager compensation survey and also has worked with Palm Beach County Water Utilities reviewing a portion of its billing database. The utility's concern was possible under-billing, and our work involved a review of billing records for reasonableness and consistency, as well as extensive work in the field. Thanks to Ms. Knutson's work, the Utility recovered our fee several times over.

Ms. Knutson's prior employment includes stints with Palm Beach County's Department of Building, Planning, and Zoning, and with the County Health and Rehabilitative Services. She has also worked with the State of Florida's Department of Corrections and with the State's Department of Employment Services. She has also been involved with a number of private and non-profit concerns, such as the Visiting Nurses Association and Oakwood Mental Health Center of the Palm Beaches. Ms. Knutson has an associate's degree in business education from West Georgia College in Carrollton, Georgia. Kathryn currently resides in Oneida County, WI.

## *More CB&A Clients...*



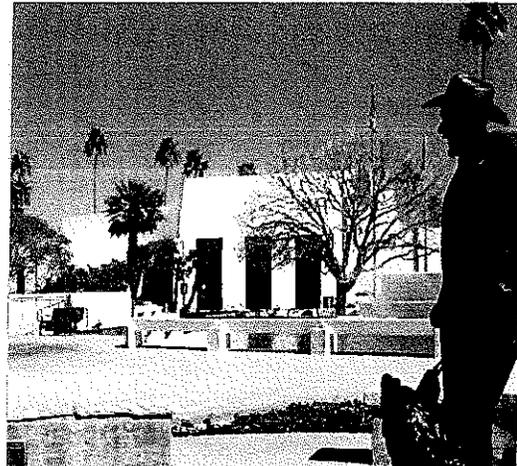
*City of Roanoke, VA  
City Manager  
City Attorney  
Economic Development Director  
Planning, Building and  
Development Director*



*Oregon City, OR  
Finance Director*



*James City County, VA  
County Administrator*



*City of Scottsdale, AZ  
City Manager*

### ***III: Technical Approach***

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The following search methodology has been refined over the past sixteen years and now is virtually foolproof. We will modify it to 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 elected officials and other stakeholders. Our goal is to develop a strong sense of your community, 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 elected officials 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 elected officials 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 City 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 position description and comprehensive recruitment profile. We will provide our draft for your review and comment. Your suggestions will be incorporated, and the final documents 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

## ***II: Technical Approach (continued)***

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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 yields strong candidates. We intend to contact the members of organizations such as the International City/County Management Association (ICMA), Florida League of Cities, Ken Small's (of the FLC) CMs, and other similar organizations. We will also post it on our website: [www.cb-asso.com](http://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 over seven 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.
- **LinkedIn:** We will use LinkedIn, a professional networking tool to reach out to potentially strong candidates.

### ***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 elected officials. 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 top ten to fifteen candidates. Some of these may be in-house candidates or individuals who have held high-level positions in other governments but who have never been the Administrator.

Often these people simply need the opportunity. Using a football analogy, Vince Lombardi was an assistant coach with the New York Giants prior to being hired by the

## ***II: Technical Approach*** *(continued)*

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Green Bay Packers. Hence, we do not believe we should only consider those who have already held the position we are recruiting for.

**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. Candidate Materials and Background Investigations.** 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:** Finally, 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.
- **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 elected officials. 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.
- **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.
- **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.
- **Interviews of References:** We tell the candidate with whom we wish to speak. These include current and former elected officials, 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

## ***II: Technical Approach (continued)***

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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.

*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 Additional Candidate Materials***

For the selected candidates, CB&A will compile the information we have developed into a written report for each recommended candidate. Specifically, this information will be the candidates' resumes, introductions, background checks, Internet / Google search results and reference checks. 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. A complete sample candidate report is included as Appendix C. The preceding information will be forwarded to you electronically.

The goal in developing these materials will be to give the City a clear picture of the candidates and to determine which ones best meet the criteria established 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 and, with the City's concurrence, the candidate will be dropped from further consideration.

### ***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 goal is to select four to six candidates to interview.

### ***Task Seven: Notify All Candidates of Their Status***

We will notify the selected candidates by telephone and give them the opportunity to ask additional questions. CB&A will also contact those not selected to advise them 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.

## ***II: Technical Approach (continued)***

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### ***Phase IV: Coordinate the Interview Process and City Manager 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 elected officials observe the finalists in a number of settings. We will also recommend you invite the finalists' spouses so they can spend time in and evaluate your community.

**Day #1:** The finalists are given a tour of the community and its facilities by a knowledgeable staff member. Later, senior staff members meet briefly with the candidates. This opportunity allows the finalists to ask questions and the senior staff to assess the candidates.

Later, that evening, the elected officials host a reception for the candidates. The purpose is to observe how the finalists respond to a social situation. Your next City Manager 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 elected officials and the candidates get to know one another informally. It should be noted that confidentiality may preclude a reception.

**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 elected officials 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, Administrators succeed and fail based on their interaction with the elected officials and the one-on-one interviews are an excellent way to test that interaction.

After lunch, the elected officials 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 elected officials adjourn and hold a meeting a day or two later to select the next City Manager. 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.

## ***II: Technical Approach (continued)***

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### ***Phase V: Negotiation and Continuing Assistance***

#### ***Task Ten: Notification, Contract Negotiations and Warranty***

Should the elected officials wish, we will 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 Manager. 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 biweekly 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.

## ***II: Technical Approach (continued)***

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### ***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 Manager, and any evaluations of the organization completed in the last year.

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

## ***II: Technical Approach (continued)***

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### ***Suggested Project Schedule***

The following is the schedule we would suggest and assumes CB&A is selected to complete the search by early January 2015. It also assumes we are selected to begin work prior to October 1, 2014.

#### ***Phase I: Needs Assessment / Information Gathering***

- October 7<sup>th</sup>: CB&A begins working with the Mayor and City Commissioners to understand the job and its challenges.
- October 14<sup>th</sup>: CB&A submits the draft of the full recruitment profile to the City for its review. Comments will be due back by October 17<sup>th</sup>.

#### ***Phase II: Recruiting***

- October 21<sup>st</sup>: CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to over 7,400 local government professionals.
- November 14<sup>th</sup>: Closing date for submission of applications.
- November 19<sup>th</sup>: CB&A reports the results of the recruitment to the Elected Officials.

#### ***Phase III: Screening, Reference Checks and Credential Verification***

- December 11<sup>th</sup>: CB&A forwards the candidate report and materials to the City. These will include the candidates' resumes, a summary of our interviews with the candidates, the results of our background and reference checks, and Internet/newspaper archives results.
- December 16<sup>th</sup>: CB&A reviews the semi-finalists' qualifications with the City officials. City officials selects finalist.

#### ***Phase IV: Interview Process Coordination and City Selection***

- January 2<sup>nd</sup>: City holds reception for the finalists.
- January 3<sup>rd</sup>: One-on-one and full Council Interviews.
- January 6<sup>th</sup>: City selects its next City Manager.

#### ***Phase V: Negotiation, Warranty & Continuing Assistance***

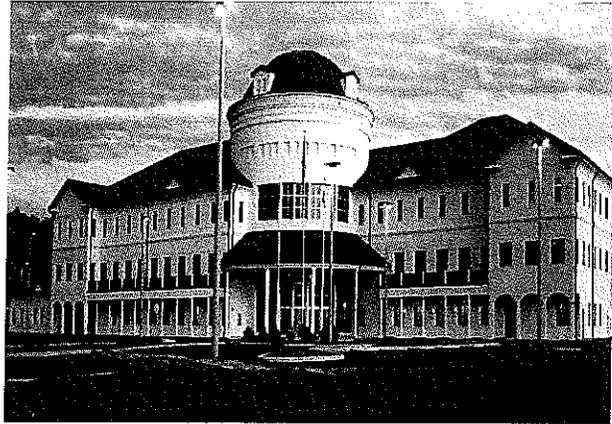
- Post-Selection: CB&A works with City representatives and the selected candidate on an Employment agreement. Typically this process takes two weeks before a contract is ready to be ratified.

# *More CB&A's Clients*



*Clay County, FL*

*County Manager*



*Flagler County, FL*

*County Administrator*



*St. Johns County, FL*

*Library Systems Director  
County Administrator  
Director, Economic Development*



*Brevard County, FL*

*County Manager*

## IV. References

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The staff at Colin Baenziger & Associates has completed over 200 searches for city and county managers and more than 300 senior-level local government management searches overall. Each of the aforementioned staff members participated in this search. Note: Appendix A provides a list of all of our executive searches.

### **County Administrator, Bay County, FL (population 158,000).**

**Contact:** Commissioner Mike Nelson at (850) 248-8140 or [mnelson@baycountyfl.gov](mailto:mnelson@baycountyfl.gov),  
Commissioner Mike Thomas at (850) 248-8140 or [mthomas@baycountyfl.gov](mailto:mthomas@baycountyfl.gov)  
County Administrator Ed Smith at (850) 248-8140 or [esmith@baycountyfl.gov](mailto:esmith@baycountyfl.gov)

CB&A was selected on June 7, 2005 to perform this search. Our effort involved searching the country to locate the best people for the job, interviewing them, conducting thorough background checks, and recommending finalists for the county to interview. The contract was a firm fixed fee of \$18,000 which included our fee and all our expenses. It also included a two year guarantee should the selected candidate leave for any reason. The only item the county had to pay for was bringing the candidates and their spouses to the county for the interviews. We were the prime and only contractor. Interviews were held on September 9<sup>th</sup> and 10<sup>th</sup> with *Edwin Smith, former City Manager of Chiefland, FL*, and Assistant County Administrator of Marion County, FL, selected on September 11, 2005 and remains with the County.



### **City Manager, City of Cape Canaveral, FL (population 10,200)**

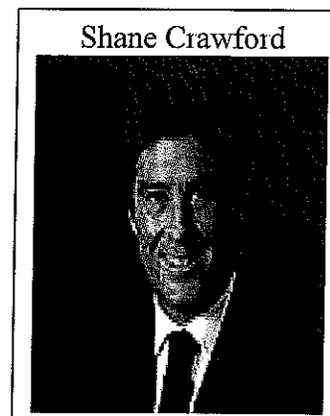
**Contact:** Mayor Rocky Randel at (321) 784-5694 or [rocky-cape@cfl.rr.com](mailto:rocky-cape@cfl.rr.com)

CB&A was selected to perform Cape Canaveral's City Manager on January 12, 2010. We sought candidates from around the country but focused our attention on those from Florida. The City Council interviewed the candidates we recommended but also requested we evaluate the credentials of the City Clerk which caused a delay. Ultimately, the City Council selected *Mr. David Greene, formerly the City Manager of Winter Haven, FL*, on May 18<sup>th</sup>.

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

**Contact:** Mayor Travis Palladeno at (727) 239-5549, or  
[TPalladeno@madeirabeachfl.gov](mailto: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 thorough 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 22<sup>nd</sup>.



#### ***IV. References (continued)***

##### ***City Manager, Cocoa Beach, FL (population 11,200) in 2012***

**Contact:** Mayor David Netterstrom at (321) 868-3206 or  
**[dnetterstrom@cityofcocoabeach.com](mailto:dnetterstrom@cityofcocoabeach.com)**

CB&A began work on May 14, 2012, to assist Cocoa Beach in finding its next **City Manager**. Our work included scouring the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, recommending finalists for the city to interview and helping with the contract negotiations. *Bob Majka, then Deputy County Administrator of Bay County, FL*, was selected on August 13, 2013.

Bob Majka



##### ***City Manager, Hallandale Beach, FL (population 39,000)***

**Contact:** Mayor Joy Cooper at (954) 632-5700 or  
**[JCooper@cohb.org](mailto:JCooper@cohb.org)**

Colin Baenziger & Associates was asked to conduct an expedited recruitment for the **City Manager**. We first met with Hallandale Beach officials on July 28, 2010. We quickly produced a recruitment profile and began recruiting candidates. The deadline for applications was August 24<sup>th</sup>. *Hallandale Assistant City Manager Mark Antonio* was selected on September 20<sup>th</sup> from a pool of nine candidates. When Mr. Antonio retired 20 months later (he was in the DROP program and had to leave), we were again retained and *Ms. Renee Crichton, formerly an Assistant City Manager with Miami Gardens, FL*, was hired.

Renee Miller



##### ***County Administrator, James City County, VA (population 70,500)***

**Contact:** Board Chair Mary Jones at (757) 229-5977 or  
**[mary.jones@jamescitycountyva.gov](mailto:mary.jones@jamescitycountyva.gov)**, or  
Human Resources Director James "Pete" Peterson at  
(757) 253-6739 or  
**[James.Peterson@jamescitycountyva.gov](mailto:James.Peterson@jamescitycountyva.gov)**

James City County has a long and storied history and is home to colonial Williamsburg, VA. CB&A was hired in March 2014 to find the County's next County Administrator. We were asked to search for someone knowledgeable of local government but who specifically knew how to maximize operational efficiency and effectiveness. Our work involved searching the nation for just the right candidate. When we did not find just the right candidate after our first search effort, we restarted the process. Beyond seeking the best candidates, our work involved candidate screening, complete and thorough background checks, and coordinating the interviews and selection process as well as providing advice concerning the contract. On July 29<sup>th</sup>, the County Board of Supervisors selected *Mr. Bryan Hill, then Deputy County Administrator for Beaufort County, SC*.

Bryan Hill



#### *IV. References (continued)*

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##### ***Village Manager, Pinecrest, FL (population 19,400)***

**Contact:** Mayor Cindy Lerner at (305) 234-2121, [clerner@pinecrest-fl.gov](mailto:clerner@pinecrest-fl.gov)

In late April 2011, CB&A was hired to assist Pinecrest in finding its next Village Manager. We worked with a Citizen's Advisory Committee and sought out candidates from around the nation while, due to the Council's desire, focusing on candidates from Florida. Interviews were held on July 17<sup>th</sup> and 18<sup>th</sup> with *Ms. Yocelyn Galiano Gomez* being selected as the Village Manager on the 18<sup>th</sup>. Ms. Gomez was an internal candidate and the Assistant Village Manager.



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

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

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



##### ***County Manager, St. Johns County, FL (population 162,000)***

**Contact:** Commissioner Ron Sanchez (904) 209-0302, or [bccd2@sjcfl.us](mailto:bccd2@sjcfl.us)  
County Attorney Patrick McCormick at (904) 209-0805, or [pmccormack@co.st-johns.fl.us](mailto:pmccormack@co.st-johns.fl.us)

Colin Baenziger & Associates was selected on December 28, 2006, to conduct the **County Administrator** search. At the request of the county, we lengthened our normal 90-day process and interviews were held on May 17<sup>th</sup> and 18<sup>th</sup> with a final selection scheduled for May 22, 2007. Our work included scouring the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, and recommending finalists for the city to interview. *Mr. Michael Wanchuck*, Assistant City Manager for Richardson, TX, was selected. We subsequently found a Director of Health and Human Services as well as a Director of Library Services for the County.

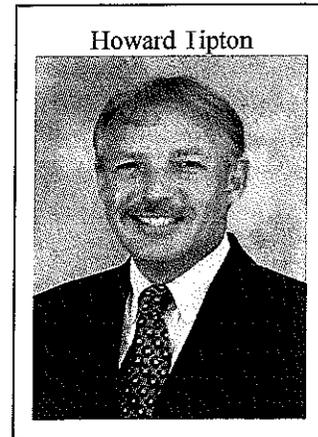


#### ***IV. References (continued)***

##### ***County Manager, St. Lucie County, FL (population 283,900)***

**Contact:** County Attorney Dan McIntyre at (772) 462-1417 or  
[McIntyreD@StLucieCo.org](mailto:McIntyreD@StLucieCo.org)

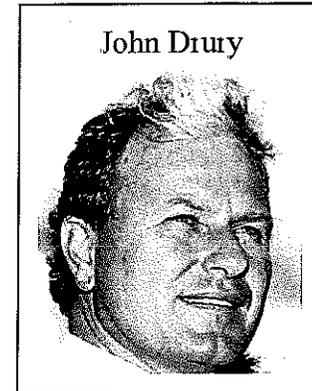
St. Lucie County is located on Florida's Atlantic Coast and approximately 130 miles north of Miami. CB&A was selected in January 2014 to help find the County's next **County Administrator**. Our work included recruiting and advertising for candidates, conducting background checks, selecting the most qualified, recommending them for interviews, coordinating the interview process, and assisting in the contract negotiations. Interviews took place on April 18<sup>th</sup> and *Howard Tipton, former Deputy County Administrator for Orange County, FL*, was selected on April 22<sup>nd</sup>



##### ***City Administrator, Tavares, FL (population 11,000).***

**Contact:** Former Mayor Nancy Clutts at (352) 552-4829  
 City Manager John Drury at (352) 742-6209

On July 5<sup>th</sup>, 2006, CB&A took over a search that the City had begun. Our effort involved searching the country to locate the best people for the job, interviewing them, conducting thorough background checks, and recommending finalists for the city to interview. The search was completed on September 22<sup>nd</sup> with the selection of *John Drury, formerly City Manager of Stowe, VT*.



#### **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.

<b>Placement</b>	<b>Formerly</b>	<b>Recruited To Be</b>	<b>Contact at</b>
Kristen Denne	City Manager Johnstown, PA	Township Manager Springettsbury Township, PA Appointed August 2014	(717) 757-3521 <a href="mailto:kristen.denne@springettsbury.com">kristen.denne@springettsbury.com</a>
Eden Freeman	Assistant City Manager Sandy Springs, GA	City Manager Winchester, VA Appointed June, 2014	(540) 667-1815 <a href="mailto:citymanager@winchesterva.gov">citymanager@winchesterva.gov</a>
Bryan Hill	Deputy County Administrator Beaufort County, SC	County Administrator James City County, VA Appointed July 2014	(757) 253-6604 <a href="mailto:bryan.hill@jamescitycountyvva.gov">bryan.hill@jamescitycountyvva.gov</a>

## ***V. Cost and Warranty***

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### **Cost**

CB&A offers a firm, fixed fee of \$23,000 for all of costs associated with needs analysis, recruiting, expenses, preliminary screenings, interview coordination, and continuing assistance. It should be noted that CB&A has never asked a client to pay anything beyond the agreed upon fee even when it was warranted due to unforeseen circumstances. The only costs beyond our fee that 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). This fee structure is advantageous to both the City and CB&A: the City can have a certain amount of flexibility in the overall price of the search and CB&A will not need to keep track of every minor expense.

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

Phase I: Needs Analysis / Information Gathering	\$3,500
Phase II: Recruiting	\$9,000
Phase III: Full Background Checks	\$7,500
Phase IV: Interview Process Coordination and City Manager Selection	\$1,500
Phase V: Negotiation and Continuing Assistance	\$1,500

If the City asks us to perform work that is clearly beyond the scope of this proposal, it will be billed at a rate of \$125 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 and assuming it selects from among the candidates we recommend, we warrant the following:

- 1) We will not approach the selected candidate for any other position as long as the individual is employed by the City.
- 2) If the selected individual leaves for any reason other than an Act of God (such as total incapacitation or death) within the first year, CB&A will repeat the search at no charge for our services. If the individual leaves for any reason other than an Act of God (such as total incapacitation or death) during the second year, CB&A will repeat the search for the cost of its 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.

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*Required Forms*

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<p><b>Submit RFP to:</b></p> <p><b>CITY OF DELTONA</b></p> <p>2345 Providence Blvd. Deltona, Florida 32725 Attn: <b>Purchasing</b></p> <p><b>CLEARLY MARK SEALED ENVELOPE WITH BID NAME AND NUMBER</b></p>	<p><b>REQUEST FOR PROPOSALS # 15004</b></p> <p><b>EXECUTIVE SEARCH FIRM</b></p>
<p><u>Contact:</u></p> <p>Kate Krauss, Purchasing Manager Phone: (386) 878-8100 Fax: (386) 878-8571</p>	<p><b>RESPONDENTS NAME:</b></p> <p><u>Colin Baenziger &amp; Associates</u></p>
<p><u>Responses Due Date &amp; Time:</u></p> <p><b>Tuesday, November 25, 2014 AT 2:00 P.M.</b></p>	<p><b>MAILING ADDRESS:</b></p> <p><u>2055 South Atlantic Avenue, Suite 504 Daytona Beach Shores, FL 32118</u></p>
<p><u>Location of Public Opening:</u></p> <p>City of Deltona, 1st Floor Conference Room 2345 Providence Blvd., Deltona, FL 32725</p>	<p>_____</p> <p>_____</p> <p>Phone#: (561) 707-3537</p>

**GENERAL CONDITIONS, INSTRUCTIONS AND INFORMATION**

15004  
RFP ~~14022~~ Executive Search Firm

ADDRESS TO:  
THE CITY OF DELTONA  
KATE KRAUSS, PURCHASING MANAGER  
2345 PROVIDENCE BLVD.  
DELTONA, FLORIDA 32725

I acknowledge receipt of Addenda No (s) \_\_\_\_\_  
I have included:

- Vendor Information Sheet ✓
- References (Include in Tab 7) ✓
- Non-Collusion Affidavit ✓
- Drug Free Workplace Form ✓
- Conflict of Interest ✓

(Check mark items above as a reminder that they are included )  
Mailing Address: 2055 South Atlantic Ave., Daytona Beach Shores, FL 32118  
Telephone: (561) 707-3537  
Fax: (888) 635-2430

Date: 11/19/14

Signed: 

Printed Name: Kathryn Knutson

Title: Vice President for Operations

## CITY OF DELTONA VENDOR INFORMATION SHEET

The information below is required to complete your proposal packet. Type or print only

Company Name: Colin Baenziger & Associates  
 Address 1: 2055 South Atlantic Avenue  
 Address 2: Suite 504  
 City: Daytona Beach Shores  
 State: Florida  
 Zip Code: 32118  
 Phone Number: (561) 707-3537  
 Fax Number: (888) 635-2430  
 Project Contact: Colin Baenziger  
 e-mail address: Colin@cb-asso.com

### Remittance (Payment) Mailing Information

Address 1: 2055 South Atlantic Avenue  
 Address 2: Suite 504  
 City: Daytona Beach Shores State: FL  
 Zip Code: 32118  
 Phone Number: (561) 707-3537  
 Fax Number: (888) 635-2430  
 Project Contact: Colin Baenziger  
 e-mail address: Colin@cb-asso.com  
 Federal Tax ID No.: 324-40-4451

Tax ID Type:  Federal Tax ID  Social Security Number

15004  
**RFP 14022 Executive Search Firm**  
**REFERENCES – include in Tab 7**

#1	Agency	City of Titusville, FL
	Address	555 South Washington Avenue
	City, State, ZIP	Titusville, FL 32795
	Contact Person	Mayor Jim Tulley or Assistant City Manager Tom Abbate
	Telephone	321-383-5802
		Email: Mayor@titusville.com, or Thomas.Abbate@titusville.com
	Date(s) of Service	April to July 2014
	Type of Service	Executive recruitment of city manager
	Comments:	
#2	Agency	St. Lucie County, FL
	Address	2300 Virginia Avenue
	City, State, ZIP	Fort Pierce, FL 34982
	Contact Person	County Attorney Dan McIntyre
	Telephone	(772) 462-1417
	Date(s) of Service	January to April 2014
	Type of Service	Executive recruitment of County Administrator
	Comments:	
#3	Agency	City of Miramar, FL
	Address	2300 Civic Center Place
	City, State, ZIP	Miramar, FL 33025
	Contact Person	Commissioner Yvette Colbourne
	Telephone	(954) 560-5161
	Date(s) of Service	May to August 2013
	Type of Service	Executive recruitment of city manager
	Comments:	

**REFERENCES-CONTINUED**

#4	Agency	City of Cocoa Beach, FL
	Address	2 South Orlando Avenue
	City, State, ZIP	Cocoa Beach, FL 32931
	Contact Person	Mayor David Netterstrom
	Telephone	(321) 868-3206
	Date(s) of Service	May to August 2012
	Type of Service	Executive recruitment of city manager
	Comments:	
#5	Agency	City of North Port, FL
	Address	4970 City Hall Boulevard
	City, State, ZIP	North Port, FL 34286
	Contact Person	Mayor Jim Blucher
	Telephone	(941) 429-7135
	Date(s) of Service	Late December 2010 to Early March 2011
	Type of Service	Executive recruitment of city manager
	Comments:	

**NON-COLLUSION AFFIDAVIT**

I, Colin Baenziger, depose and say that:

1. I am Owner and Principal of the firm of Colin Baenziger & Associates, the firm submitting the response described in this Request for Proposals for:

RFP 14017 Auditing Service and that I executed the said response with full authority to do so:

2. the prices in this bid have been arrived at independently without collusion, consultation, communication or agreement for the purpose of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor;

3. unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to bid opening, directly or indirectly, to any other bidder or to any competitor; and

4. no attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit, or not to submit, a bid for the purpose of restricting competition;

5. the statements contained in this affidavit are true and correct, and made with full knowledge that the City of Deltona relies upon the truth of the statements contained in this affidavit in awarding contracts for said project.

Signature of Bidder: Colin Baenziger Date: 11/19/14  
STATE OF: Florida CITY OF: Daytona Beach Shores

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, (name of individual signing) affixed his/her signature in the space provided above on this 19 day of 20  .

**NOTARY PUBLIC**

My Commission Expires: \_\_\_\_\_

**My Commission Expires  
July 1, 2017**



**DRUG-FREE WORKPLACE FORM**

The undersigned vendor in accordance with Florida Statute 287 087 hereby certifies that:

Colin Baenziger & Associates

(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1)
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 (Florida Statutes) or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, or any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Colin Baenziger

Proposer's Signature

11/19/14

Date

NOTARY PUBLIC

My Commission Expires

[Signature]



My Commission Expires  
July 1, 2017

**LOBBYING AND CONFLICT OF INTEREST CLAUSE  
ETHICS CLAUSE**

... Colin Baenziger & Associates  
(Company)

... Colin Baenziger \_\_\_\_\_ warrants that he/it has not employed, retained or otherwise had act on his/its behalf any former City officer or employee or any City officer or employee. For breach or violation of this provision the City may, in its discretion, terminate this contract without liability and may also, in its discretion, deduct from the contract or purchase price, or otherwise recover the full amount of any fee, commission, percentage, gift, or consideration paid to the former City officer or employee”

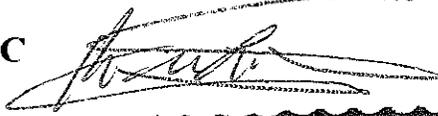
Signature Colin Baenziger  
Date: 11/19/14

STATE OF: Wisconsin CITY OF: Rhineland

Subscribed and sworn to (or affirmed) before me on (date) by (name of affiant). He/She is personally known to me or has produced as identification. (type of identification)

**NOTARY PUBLIC**

My commission expires:



**My Commission Expires  
July 1, 2017**



**Submission of Proposals**

*Internet Research  
Morrill, Christopher*

*Note: This research will be presented in reverse chronological order*

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**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.

*Internet Research  
Morrill, Christopher*

*Note: This research will be presented in reverse chronological order*

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**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.

*Internet Research  
Morrill, Christopher*

*Note: This research will be presented in reverse chronological order*

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**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.

*Internet Research  
Morrill, Christopher*

*Note: This research will be presented in reverse chronological order*

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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.

*Internet Research  
Morrill, Christopher*

*Note: This research will be presented in reverse chronological order*

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**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."

*Internet Research  
Morrill, Christopher*

*Note: This research will be presented in reverse chronological order*

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**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."

*Internet Research  
Morrill, Christopher*

*Note: This research will be presented in reverse chronological order*

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**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

*Internet Research  
Morrill, Christopher*

*Note: This research will be presented in reverse chronological order*

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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 non-personnel 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.

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Research Completed by: Vanessa Garner  
Colin Baenziger & Associates

**ORIGINAL**

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**PROPOSAL TO  
CITY OF DELTONA  
FOR  
EXECUTIVE SEARCH FIRM  
RFP # 15004**

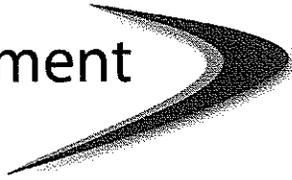
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**November 25, 2014**

**Management  
Partners**



# Management Partners



November 25, 2014

Ms. Kate Krauss  
Purchasing Manager  
City of Deltona  
Attn: Purchasing  
2345 Providence Boulevard  
Deltona, Florida 32725

Dear Ms. Krauss:

Management Partners is pleased to provide this proposal in response to Deltona's request for proposals for an Executive Search Firm.

Our rich experience as public sector consultants keeps us in touch with a broad range of talented practicing executives. This helps us identify candidates who would be an outstanding fit for your city manager, a significant factor in the very important recruitment phase of the effort. It also helps us evaluate those who ultimately express interest in the position. This perspective, unique among firms that provide executive recruitment services, assures that your needs are met.

Our team brings a combination of background and skills vital to the city's requirements. The principal recruiter will be Douglas Plunkett. Doug, a former village manager, has completed a number of successful executive recruitments since he joined Management Partners. Doug will be assisted by Alan Rosen and Sarah Krings. Their qualifications are included in our response.

We know that executive search consultants can have a profound influence on the organizations we serve. We also understand that the importance of the hire extends beyond the city to the community that depends on its services.

We appreciate the opportunity to submit this proposal and look forward to discussing our qualifications and approach for this engagement in person. If you have any questions or require additional information, please feel free to contact me.

Sincerely,

Gerald E. Newfarmer  
President and CEO

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## EXECUTIVE SUMMARY

### About Management Partners

Management Partners was founded in 1994 with a specific mission to help local government leaders improve their service to the public. We are a national consulting firm headquartered in Cincinnati, Ohio, with offices in Altamonte Springs, Florida; San Jose and Costa Mesa, California. We have a well-established track record of helping public sector organizations throughout the United States, including all of the services provided by cities, counties, towns and special districts at the local level. Our firm provides executive recruitment, interim management services, organizational analysis, process improvement, strategic planning and many other services to local governments.

During our 20 years of service, we have earned a national reputation by delivering quality, actionable work products to our clients. We bring extensive experience to this project, along with first-hand knowledge of local government operations. We are distinguished by the fact that each team we assign is led and staffed by associates who have actual experience in direct public service and experience working together as a team. The work we do is not an academic exercise; it is grounded in the real world of customer service and accomplishment in the public sector. As a result, we have a bias for producing value-added work for each client that will be actionable, and will be implemented.

The firm is staffed with 80 professionals who are experienced public service managers as well as qualified management consultants. This group includes generalists as well as subject-matter experts. Our consultants have years of experience working in all aspects of local government management and have built a track record of extraordinary quality service for our clients.

The firm has extensive experience helping improve both the efficiency and effectiveness of local government services. We have completed executive searches, interim management placements, and organizational staffing and improvement projects in virtually every type of local government.

Management Partners' services include everything required to support local government leaders, elected or appointed. The range of our services is illustrated in the following list:

- Executive Recruitment – To staff the enterprise with top quality leadership, Management Partners assists clients in recruiting talent.
- Interim Management – Assists government leaders by providing executive staff during transitional periods. Rather than just “treading water,” our approach to interim management combines continuation services along with organizational effectiveness analysis to provide a solid foundation for a new permanent employee.
- Organizational Analysis and Performance Assessments – Also called efficiency studies, audits, and organizational reviews, identifies improvements to an operation's efficiency and effectiveness.
- Performance Management – To systematically track the performance of the enterprise, including performance management and measurement, process management, performance budgeting, employee performance evaluation, and strategic and process benchmarking.
- Process Improvement – To critically examine specific business processes by which customers are served (internal or external), to identify the opportunities for improvement, using process mapping and other tools.

## **PROF. EXPERIENCE AND SUCCESS RATE**

### **Project Team**

Management Partners began our executive recruiting practice because we were receiving requests from existing clients to assist in filling key vacancies. Our clients saw value in having us apply our knowledge about their organizations when conducting an executive recruitment and hiring process. With the increasing need to integrate and coordinate across the range of government services, it became apparent that Management Partners' team members' comprehensive understanding of local government affords a useful perspective as we seek to find the right executive for an agency's management team. We take ownership of each recruitment and recognize it as a special responsibility.

Because Management Partners' team members are all experienced local government professionals and executives, we understand the environment and are both experienced and comfortable working with local government representatives at every level from elected officials to department directors to line employees. We have the ability to draw on former city or county managers, human resources directors, and other seasoned professionals as necessary to complement the team assigned to each recruitment.

We have included brief qualifications of each team member below. Complete resumes for each person are included in Attachment A to this response. Both Doug Plunkett and Sarah Krings have worked with each other of several executive recruitments over the last two years. We have added Alan Rosen to this highly capable team because of his specific experience and knowledge of the Central Florida local government environment.

### **Douglas Plunkett, Special Advisor**

Doug Plunkett has over 30 years of experience in local government management and consulting, and previously served as the village manager for Granville, Ohio for 17 years. Prior to Granville, Doug was the executive assistant to the Board of Selectmen in Duxbury, Massachusetts; a health agent in Bridgewater, Massachusetts; and District sanitarian for the southeast district in Lakeville, Massachusetts. He has volunteered to serve as the executive director of the Granville Foundation for the past ten years; and was adjunct faculty in economics, public finance, and public safety management at Franklin University. As a captain in the US Army, Doug served for six years, including two tours of duty in Viet Nam.

### **Alan Rosen, Senior Management Advisor**

Alan Rosen lives in Altamonte Springs and supports all of our Florida projects. He has more than 12 years of diverse non-profit, state and local government management experience in Florida, Georgia, New York, and as the budget manager for Washoe County, Nevada. He began his career in Broward County's Office of Management and Budget where he helped implement outcome-based budgeting. His areas of expertise include fiscal and budget analysis, performance measurement, process improvement and group facilitation. He brings a blend of analytical, budgetary and strategic skills that add value to all aspects of local government. Since joining Management Partners, Alan has consulted on almost 30 projects, in a variety of subject areas including human resources, finance and budget, public safety, and parks and recreation.

## PAST PERFORMANCE

As a national consulting and executive recruitment firm, we are unique. Most of our 80 professionals across the country have significant experience in local government as city managers, department directors, budget and finance professionals, and human resource professionals (among other areas of expertise).

In addition to our executive searches, we provide a variety of management consulting services to clients across the country. Over the last five years we have completed multiple projects for local governments throughout Florida. Some of these projects include:

- City of Sanford – Organization Assessment
- City of West Palm Beach – Fleet Efficiency Study
- City of West Palm Beach – Parks and Recreation Efficiency Study
- City of Margate – Strategic Planning
- Alachua County – Detention Facility Consultation
- City of Fort Lauderdale – Human Resources Organization Assessment
- City of Largo – Development Review Process Assessment

These kinds of projects provide Management Partners with a deeper understanding of the knowledge, skills and abilities required to manage Florida cities today.

References for recent searches that Doug Plunkett has completed follow.

#1 Agency	Village of New Concord
Address	2 West Main Street
City, State, Zip	New Concord, OH 43762
Contact Person	Hon. Greg Adams, Mayor of the Village of New Concord
Telephone	740-826-7671
Date(s) of Service	June 2014 to August 2014
Type of Service	Village Manager recruitment
Comment	

#2 Agency	City of Painesville
Address	1034 W Jackson Street
City, State, Zip	Painesville, OH 44077
Contact Person	Mr. Paul W. Hach II, President of Council
Telephone	440-350-0157
Date(s) of Service	September 2012 to May 2013
Type of Service	City Manager recruitment
Comment	

#3 Agency	Village of Yellow Springs
Address	100 Dayton Street
City, State, Zip	Yellow Springs, OH 45387
Contact Person	Hon. Brian Housh, Council Member
Telephone	937-767-9126
Date(s) of Service	December 2013 to June 2014
Type of Service	Village Manager recruitment
Comment	

*City of Deltona  
Executive Search Firm*

As a retained recruiter, Management Partners charges a previously agreed upon professional fee, that includes direct and indirect expenses. The total all-inclusive maximum price for this search is \$18,990. This will be billable in three installments, the first at the beginning of the search, the second when the pool of candidates is delivered, and the final installment when the successful candidate is appointed.

Expenses necessary to successfully complete the search include printing, travel, lodging, per diem, advertising and other necessary costs. Direct expenses, including advertising, are included in the retainer.

We bill in thirds, with \$6,330 due at the start of the project, \$6,330 when the short list of applicants is delivered, and the final \$6,330 when the selected applicant is appointed.

Please note that reimbursement of any candidate travel expenses will be the responsibility of the County. We will arrange to have these expenses submitted to you for direct payment.

Based on the scope of services for this project, we estimate that the project will take 95 days to complete. The final offer and hiring timeline will of course be up to the City Commission. It will take approximately 95 hours of work to complete the scope of work.

## UNDERSTANDING OF PROJECT AND PROJECT REQUIREMENTS

### Our Understanding of the Project

The City of Deltona, Florida, is seeking to hire a City Manager, who will be responsible for the administration of all City departments and oversight of all affairs under the jurisdiction of the City. This position is accountable to the Mayor and the City Commission. The proposed hiring salary range for the position is \$125,000 to \$150,000 per annum, plus benefits. In order to fill this position, the City is seeking a qualified executive search firm to conduct a nationwide search for this position.

### Tasks and Personnel

Management Partners has assigned Douglas Plunket, Alan Rosen, and Sarah Krings to this recruitment. During this assignment, this will be their top priority. We have included short biographies of each team member in Tab 2 and long biographies in Attachment A. We have also included a detailed list of activities and tasks we will use to successfully recruit the next City Manager for Deltona. A detailed description of these activities and tasks follows.

#### Activity 1: Develop the Candidate Profile and Recruitment Strategy

1.1	Kickoff meeting to discuss position, strategy and timeline
1.2	Create candidate profile
1.3	Create recruitment strategy
1.4	Submit candidate profile, recruitment strategy and timeline for review and edit as necessary

#### Activity 2: Conduct and Aggressive Recruitment Campaign

2.1	Create recruitment materials
2.2	Identify potential applicants
2.3	Contact applicants to determine interest
2.4	Post jobs on websites and in publications

#### Activity 3: Acknowledge Resumes and Screen Prospective Candidates

3.1	Review resumes
3.2	Narrow field to 15 to 20 candidates
3.3	Keep candidates informed of process

#### Activity 4: Conduct Interviews and Check References

4.1	Conduct initial screening interviews
4.2	Check professional references
4.3	Conduct background checks
4.4	Develop list of potential finalists

#### Activity 5: Provide Progress Report and Identify Finalists

5.1	Produce finalist list and information
5.2	Meet with City to discuss finalists

*City of Deltona  
Executive Search Firm*

weeks. Closing the search will, of course, depend upon negotiations between you and the candidate selected for hire.

### **Certified Minority Business Enterprise Statement**

Management Partners is not a certified minority business enterprise.

### **Warranty Provisions**

We guarantee our work. If the person you hire does not work out within two years, we will reopen the search and assist you in replacing the person for no additional professional fee. However, should this unlikely situation occur, we would expect to be reimbursed for out of pocket expenses for advertising, travel and related costs.

## APPROACH AND METHOD

### Management Partners' Philosophy

This proposal offers a proven process that consistently identifies excellent individuals for key positions in special districts and local governments across the nation. Our work is characterized by the following four qualities.

- **High Ethical Standards.** We conduct each search with integrity, respecting the confidentiality of the client's decision-making process and the confidentiality of the candidate's interest in the position. Importantly, we do not approach applicants who work with a client without discussing it with the client first.
- **Extensive Depth and Reach.** Management Partners seeks the best professionals for the position by speaking with knowledgeable people about who superb candidates might be and will seek to interest those individuals in considering the position. In addition, we carefully choose online publications and media outlets (including social media) to advertise the position to encourage all qualified persons to apply.
- **Quality Client Representation.** Management Partners is the agent of the client in conducting an executive search and we recognize the responsibility to present the client in the most positive manner. Moreover, throughout the selection process we assist the client in presenting employment situation in the most positive of terms.
- **Well-planned and Executed Hiring Support.** Management Partners provides advice and support throughout the hiring process. Candidates are treated with respect and we help complete the hiring process in a way designed to launch the appointee's new relationship with the organization positively and productively.

Our approach is designed to ensure high quality performance to assure that you have an excellent pool from which to choose. The approach is individually planned and executed to ensure that your needs are met with a budget and schedule that works for you. We work with you to articulate the core values of the organization and the key issues to be addressed when recruiting a new person.

**We recruit aggressively.** Our work as a firm gives us a national presence through the clients we serve and the skills and contacts of our staff. This perspective is a particular strength as we work to bring best practices as well as highly qualified candidates to your organization. We believe that aggressive outreach is the key to success in executive recruitment rather than to simply hope that the right person will respond to a passive advertisement.

**We get results.** We will complete a search to your satisfaction regardless of the time and effort required.

**We guarantee our work.** If the person you hire does not work out within a year, we will reopen the search and assist you in replacing the person for no additional professional fee. Should this unlikely situation occur, we would expect to be reimbursed for out of pocket expenses for advertising and related costs.

Our services include:

- A calendar that includes regular progress reports and concludes on schedule with the successful selection of the professional you choose.

This document drives the recruitment and enables us to focus our efforts on candidates who will be most able to do the job.

### **Activity 2: Conduct an Aggressive Recruitment Campaign**

We believe that our consulting work throughout the country as well as our knowledge of and contacts with professionals in local government management gives us a particular advantage in conducting an aggressive recruitment campaign. Based on the feedback we receive from you as a result of Activity 1, we will design recruitment materials. We will canvass our networks to identify candidates who will be most able to do the job and distribute the brochure to qualified professionals and those who could refer qualified individuals to us. We will supplement these methodologies by placing targeted advertisements and electronic postings in to attract candidates. An example of professional organizations through which we may post a listing include the International City/County Management Association (ICMA), the Florida City/County Management Association (FCCMA), National League of Cities (NLC), Florida League of Cities (FLC), National Forum for Black Public Administrators (NFBPA), and International Hispanic Network (IHN), among others. And, we will make direct, personal contact with those we believe would be a best fit for your position. We will use the written profile and other materials that describe the community to help us persuade those most qualified to consider the position as an outstanding career move.

### **Activity 3: Acknowledge Resumes and Screen Prospective Candidates**

As your representative to those involved in the recruitment process, we take steps to ensure that your good reputation is preserved by promptly acknowledging all applications and nominations; keeping prospective candidates advised of their status; handling the candidates who are rejected with consideration; regularly informing you about the progress of the search; and ensuring courtesy and confidentiality in our communications throughout.

We will screen the resumes of all candidates, looking for the experience and skill sets that most closely meet the requirements of the position. Those who appear to be the most highly qualified and the best fit will be selected for personal interviews and reference checks. Often, this will include between 15 and 20 candidates.

Internal candidates (current employees) will be screened using the same standards by which external candidates are evaluated.

### **Activity 4: Conduct Interviews and Check References**

Management Partners will conduct preliminary interviews with the most qualified candidates. We prefer to conduct these interviews in a face-to-face setting, but may rely on a telephone interview when distance limits cost-effectiveness.

Through these interviews we learn the individual's reason for being interested in your position, whether they have encountered challenges similar to those in your position and what the candidate believes he/she would bring to your position. We also obtain compensation history and reference information. Additionally, we ask for written authorization to conduct education, credit and criminal background checks which we might want to undertake.

We narrow the field after the initial interviews. For the top candidates, we then talk with professional references with whom they have worked (including those they have supervised and those who have supervised them). We will also conduct education, certification, credit and criminal background checks (each going back at least five to seven years) to confirm the

City of Deltona  
Executive Search Firm

## REFERENCES

<p>Hon. Greg Adams Mayor of the Village of New Concord Village of New Concord, Ohio 2 West Main Street, P.O. Box 10 New Concord, Ohio 43762 740-826-7671 <a href="mailto:gadams@newconcord-oh.gov">gadams@newconcord-oh.gov</a> Population: 1,707</p>	<p>Ms. Patricia Hanek, Vice Mayor City of Brunswick, Ohio 4095 Center Rd. Brunswick, Ohio 44212 330-225-0608 <a href="mailto:phanek@brunswick.oh.us">phanek@brunswick.oh.us</a> Population: 34,544</p>
<p>Mr. Paul W. Hach II, President of Council City of Painesville, Ohio 1034 W Jackson Street Painesville, Ohio 44077 440-350-0157 <a href="mailto:phach@painesville.com">phach@painesville.com</a> Population: 19,933</p>	<p>Ms. Debbie Mills, Human Resources Director City of Long Beach, California 333 W. Ocean Blvd. Long Beach, California 90802 562-570-6140 <a href="mailto:Debbie.mills@longbeach.gov">Debbie.mills@longbeach.gov</a> Population: 469,428</p>
<p>Hon. Brian Housh, Council Member Village of Yellow Springs, Ohio 100 Dayton St. Yellow Springs, Ohio 45387 937-767-9126 <a href="mailto:brianhoush@vil.yellowsprings.oh.us">brianhoush@vil.yellowsprings.oh.us</a> Population: 3,513</p>	

*City of Deltona  
Executive Search Firm*



**RFP 15004 Executive Search Firm**

ADDRESS TO:  
 THE CITY OF DELTONA  
 KATE KRAUSS, PURCHASING MANAGER  
 2345 PROVIDENCE BLVD.  
 DELTONA, FLORIDA 32725

I acknowledge receipt of Addenda No.(s) 0 -

I have included:

- Vendor Information Sheet ✓
- References (Include in Tab 7) ✓
- Non-Collusion Affidavit ✓
- Drug Free Workplace Form ✓
- Conflict of Interest ✓

(Check mark items above, as a reminder that they are included.)

Mailing Address: 1730 Madison Road, Cincinnati, OH 45206

Telephone: 513-861-5400

Fax: 513-861-3480

Date: \_\_\_\_\_

Signed: *Gerald E. Newfarmer*

Printed Name: Gerald E. Newfarmer

Title: President and CEO

### CITY OF DELTONA VENDOR INFORMATION SHEET

The information below is required to complete your proposal packet. Type or print only.

Company Name: Management Partners

Address 1: 1730 Madison Road

Address 2: \_\_\_\_\_

City: Cincinnati

State: Ohio

Zip Code: 45206

Phone Number: 513-861-5400

Fax Number: 513-861-3480

Project Contact: Gerald E. Newfarmer

e-mail address: jnewfarmer@managementpartners.com

#### Remittance (Payment) Mailing Information

Address 1: same as above

Address 2: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Project Contact: \_\_\_\_\_

e-mail address: \_\_\_\_\_

Federal Tax ID No.:  
31-1407585

Tax ID Type:  Federal Tax ID  Social Security Number

**NON-COLLUSION AFFIDAVIT I, \_**

Kevin Knutson \_\_\_\_\_, depose and say that:

1 I am Regional Vice President of the firm of Management Partners,  
the firm submitting the response described in this Request for Proposals for:

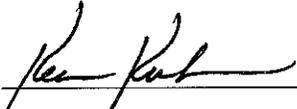
RFP 14017 Auditing Service and that I executed the said response with full authority to do so:

2. the prices in this bid have been arrived at independently without collusion, consultation,  
communication or agreement for the purpose of restricting competition, as to any matter relating to  
such prices with any other bidder or with any competitor;

3. unless otherwise required by law, the prices which have been quoted in this bid have not been  
knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to bid  
opening, directly or indirectly, to any other bidder or to any competitor; and

4. no attempt has been made or will be made by the bidder to induce any other person, partnership  
or corporation to submit, or not to submit, a bid for the purpose of restricting competition;

5. the statements contained in this affidavit are true and correct, and made with full knowledge that  
the City of Deltona relies upon the truth of the statements contained in this affidavit in awarding  
contracts for said project.

Signature of Bidder:  Date: 11/21/14  
STATE OF: Ohio CITY OF: Cincinnati

PERSONALLY APPEARED BEFORE ME, the undersigned authority,  
who, after first being sworn by me, (name of individual signing) affixed his/her signature in the  
space provided above on this 21<sup>st</sup> day of November, 2014

**NOTARY PUBLIC**   
My Commission Expires: \_\_\_\_\_

**JERI L. BECKSTEDT**  
Notary Public, State of Ohio  
My Commission Expires 04-15-2017

**DRUG-FREE WORKPLACE FORM**

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that:  
Management Partners

(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 (Florida Statutes) or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, or any employee who is so convicted
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.)

*Kari Kent*  
Proposer's Signature

11/21/14  
Date

NOTARY PUBLIC *Jeri L. Beckstedt*  
My Commission Expires:

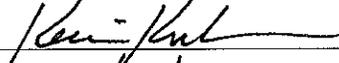
**JERI L. BECKSTEDT**  
Notary Public, State of Ohio  
My Commission Expires 04-15-2017

**LOBBYING AND CONFLICT OF INTEREST CLAUSE  
ETHICS CLAUSE**

“ “

(Company)

“ Management Partners warrants that he/it has not employed, retained or otherwise had act on his/its behalf any former City officer or employee or any City officer or employee. For breach or violation of this provision the City may, in its discretion, terminate this contract without liability and may also, in its discretion, deduct from the contract or purchase price, or otherwise recover, the full amount of any fee, commission, percentage, gift, or consideration paid to the former City officer or employee”.

Signature 

Date: 11/21/14

STATE OF: Ohio CITY OF: Cincinnati

Subscribed and sworn to (or affirmed) before me on (date) by (name of affiant). He/She is personally known to me or has produced as identification. (type of identification)

**NOTARY PUBLIC** 

My commission expires:

**JERI L. BECKSTEDT**  
Notary Public, State of Ohio  
My Commission Expires 04-15-2017

**Submission of Proposals**

## **ATTACHMENT A – PROJECT TEAM RESUMES**

### **DOUGLAS PLUNKETT**

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Doug Plunkett has over 30 years of experience in local government management and consulting. He served as the Village Manager for Granville, Ohio for 17 years. Prior to Granville, Doug was the Executive Assistant to the Board of Selectmen in Duxbury, Massachusetts; a Health Agent in Bridgewater, Massachusetts; and District Sanitarian for the southeast district in Lakeville, Massachusetts. For the past ten years, Doug has been consulting on a wide range of local government issues, programs and projects throughout Ohio.

Doug has been active in teaching, including environmental science at Central Ohio Technical College; a course on ethics and integrity for the Ohio Certified Public Manager Program; a course on local government management for the Auditor of the State of Ohio; and Principles of Microeconomics/Macroeconomics, Contemporary Issues in Public Safety Management, Public Finance & Budgeting, Applied Business Systems at Franklin University.

He also has been active in professional organizations, both as a member of the International City/County Management Association and as president of the Ohio City Managers Association. Doug earned an Associate of Arts in Liberal Arts from Holyoke Community College, a Bachelor of Science in Environmental Health from the University of Massachusetts-Amherst, and a Masters in Public Administration from Suffolk University. As a Captain in the US Army, Doug served for six years, including two tours of duty in Viet Nam.

## **SARAH C. KRINGS**

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Sarah Krings, Management Analyst, joined Management Partners in November 2012. She graduated from Xavier University in 2009 with a B.S.B.A. in Business Administration. Since joining Management Partners, she has contributed to a variety of projects by analyzing data and assisting with executive recruitments. Most recently Sarah has helped with the Long Beach, California assistant city manager executive recruitment. She has served as a key team member on numerous other executive recruitment projects, including: New Concord, Ohio, village administrator; Yellow Springs, Ohio, village manager; Springdale, Ohio, economic development director; Brunswick, Ohio, city manager; and the Painesville, Ohio city manager. While in school, Sarah gained valuable experience during an internship with the Cincinnati Bengals where she researched, organized, and analyzed sponsorship data and compiled information into detailed reports for senior management. Sarah also developed suite enhancement proposals based on surveys and feedback from premium clients. Sarah contributes excellent research and organizing skills on behalf of Management Partners' clients.





S. RENÉE NARLOCH  
& ASSOCIATES  
PROFESSIONAL EXECUTIVE RECRUITMENT

**ORIGINAL**  
A PROPOSAL TO CONDUCT  
EXECUTIVE RECRUITMENT SERVICES  
FOR THE  
**CITY MANAGER**  
ON BEHALF OF THE  
**CITY OF DELTONA, FLORIDA**

S. RENÉE NARLOCH, PRESIDENT  
2910 Kerry Forest Pkwy D4-242, Tallahassee, FL 32309  
P 850.391.0000 | F 850.391.0002  
[info@srnsearch.com](mailto:info@srnsearch.com)

1102 S. Austin Ave 110-296, Georgetown, TX 78626  
P 512.843.5439 | F 850.391.0002  
[info@srnsearch.com](mailto:info@srnsearch.com)

[www.srnsearch.com](http://www.srnsearch.com)

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November 25, 2014

Mayor John C. Masiarczyk  
and City Commissioners  
c/o Ms. Kate Krauss, CPPO, CPPB, SPSM  
Purchasing Manager  
City of Deltona  
Deltona City Hall  
2345 Providence Boulevard  
Deltona, FL 32725

Dear Mayor Masiarczyk and Commissioners:

We appreciate the opportunity to provide the City of Deltona with a proposal to conduct a search for City Manager. Our proposal includes an overview of our qualifications and costs related to our services.

With respect to this recruitment for the City of Deltona, you should know:

- ☛ S. Renée Narloch & Associates has extensive experience conducting quality searches that result in the placement of candidates ideally suited to clients' needs. S. Renée Narloch & Associates was recently incorporated in the State of Florida and is a small, woman-owned business. For the last ten years, Ms. Narloch, President, has served as the Senior Vice President of Recruitment for a nationwide public sector consulting firm, responsible for recruitments in 40 states. Her career in public sector recruitment spans over 25 years, during which time she has participated in hundreds of public sector searches nationwide.
- ☛ S. Renée Narloch & Associates is currently conducting City/County Manager recruitments on behalf of Palm Beach County, FL (County Administrator) and Franklin County (Columbus), OH (County Administrator). Ms. S. Renée Narloch, President, has extensive experience conducting public sector executive recruitments throughout the nation, including more than 400 searches for clients such as the Wake County, NC (County Manager); City of Fort Lauderdale, FL (City Manager; City Attorney; Building Official); Town of Palm Beach, FL (Town Manager); Town of Jupiter, FL (Town Manager); City of Miami Beach, FL (City Manager in 2002 and 2013); City of Ocala, FL (City Manager); City of Dallas, TX (City Manager; Assistant Director of Water Utilities; Assistant Director of Transportation Operations); Broward County, FL (County Attorney; Port Everglades CEO/Executive Director; several other positions); Pasco County, FL (County Manager); Alachua County, FL (County Manager); Lee County, FL (County Manager; County Attorney); Sumter County, FL (Public Works Director; Assistant Public Works Director); City of Coconut Creek, FL (City Attorney); City of Hallandale Beach, FL (Finance Director); and many others. Ms. Narloch will conduct the recruitment for the City Manager for the City of Deltona. A sample of her past clients is included in our proposal (Clients, Page 7).
- ☛ S. Renée Narloch & Associates has highly trained staff, a vast network of contacts and professional affiliations in public sector management, and a proven recruitment process tailored to our clients' needs which will result in a quality pool of candidates.

Thank you for your consideration. Please do not hesitate to contact us at 850.391.0000 should you have questions or need additional information.

Sincerely,

S. Renée Narloch, President

## PRIOR EXPERIENCE & SUCCESS RATE

Our team at S. Renée Narloch & Associates is comprised of a diverse group of individuals who have extensive experience in the recruitment of public sector executives. Ms. Narloch will be the lead consultant for the City Manager recruitment for the City of Deltona, with assistance from Ms. Rachel Hanselman and Ms. Danielle Pervinich.

### S. RENÉE NARLOCH, PRESIDENT

Ms. Narloch is the President of S. Renée Narloch & Associates and the Director of our offices located in Tallahassee, Florida, and Georgetown (Austin), Texas. She is recognized as one of the nation's leading recruiters. She has more than 25 years of experience conducting public sector recruitments and has participated in more than 400 searches nationwide. Prior to forming S. Renée Narloch & Associates, Ms. Narloch spent 10 years as the Senior Vice President of a public sector executive search firm with responsibilities for clients in 40 states from Texas northward to the East Coast. She also previously served as a Senior Recruiter with DMG and MAXIMUS with sole responsibility for the firm's executive search practice in the Southeastern, Mid-Atlantic, and Mid-Western states. Ms. Narloch received her Bachelor of Science degree in Information Studies, summa cum laude, from Florida State University, Tallahassee, Florida.

### RACHEL HANSELMAN, SENIOR CONSULTANT

As a Senior Consultant with S. Renée Narloch & Associates, Ms. Hanselman is responsible for research, candidate recruitment, screening, reference checks, and background verifications. She focuses on client communication and works closely with clients to coordinate candidate outreach and ensure a successful search. Prior to joining S. Renée Narloch & Associates, Ms. Hanselman had eight years of experience managing her own retail business. Ms. Hanselman received her Bachelor of Arts degree in Business Administration from Flagler College, Tallahassee, Florida.

### DANIELLE PERVINICH, SENIOR CONSULTANT

Ms. Pervinich is the Senior Consultant responsible for the S. Renée Narloch & Associates office in Georgetown (Austin), Texas. She concentrates on client outreach and business operations. Ms. Pervinich previously worked for a local city government growth management department in the Austin area, which has given her great insight into the needs of our clients. She has seven years of experience working in executive administration in both local government and non-profit sectors. Ms. Pervinich received her Bachelor of Arts degree in Communication Studies from Southwestern University, Georgetown, Texas.

## PAST PERFORMANCE

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### OUR FIRM HISTORY AND EXPERIENCE

S. Renée Narloch & Associates' recruiters are known throughout the industry as leading public sector recruiters by both clients and candidates. We have a reputation for conducting quality searches that result in the placement of candidates ideally suited to meet our clients' needs. We pride ourselves on our responsiveness to clients and candidates, and we assure the City of Deltona that the highest caliber of service will be provided throughout the recruitment process.

S. Renée Narloch & Associates was recently incorporated in the State of Florida and is a small, woman-owned business. For the last ten years, Ms. Narloch has served as the Senior Vice President of Recruitment for a nationwide public sector consulting firm. Her career in public sector recruitment spans over 25 years, during which time she has participated in hundreds of public sector searches nationwide. In addition, our firm is comprised of individuals who are highly trained and experienced in the recruitment of public sector executives. We have offices in Tallahassee, Florida, and Georgetown (Austin), Texas.

S. Renée Narloch & Associates is currently conducting City/County Manager recruitments on behalf of Palm Beach County, FL (County Administrator) and Franklin County (Columbus), OH (County Administrator). Ms. S. Renée Narloch, President, has extensive experience conducting public sector executive recruitments throughout the nation, including more than 400 searches for clients such as Wake County, NC (County Manager); the City of Fort Lauderdale, FL (City Manager; City Attorney; Building Official); Town of Palm Beach, FL (Town Manager); Town of Jupiter, FL (Town Manager); City of Miami Beach, FL (City Manager in 2002 and 2013); City of Ocala, FL (City Manager); City of Dallas, TX (City Manager; Assistant Director of Water Utilities; Assistant Director of Transportation Operations); Broward County, FL (County Attorney; Port Everglades CEO/Executive Director; several other positions); Pasco County, FL (County Manager); Alachua County, FL (County Manager); Lee County, FL (County Manager; County Attorney); Sumter County, FL (Public Works Director; Assistant Public Works Director); City of Coconut Creek, FL (City Attorney); City of Hallandale Beach, FL (Finance Director); and many others. Ms. Narloch will conduct the recruitment for the City Manager for the City of Deltona. A sample of her past clients is included in our proposal. She will be assisted by other senior staff members, as outlined in this proposal.

We maintain a database of potential candidates, and our nationwide network of contacts and resources will be invaluable in identifying outstanding candidates, including those who may not be currently looking for opportunities. Our experience, combined with our proven recruitment process, expansive network of contacts, and knowledge of outstanding candidates nationwide, will ensure the City of Deltona has a quality group of finalists from which to select the new City Manager.

## CLIENTS

S. Renée Narloch & Associates' recruiters have extensive experience, placing more than 400 public sector professionals. Below is a list of some of the clients for which Ms. Narloch has recruited in the last few years. For a complete client list, please contact us.

Wayne County, MI  
Deputy Chief Director of Personnel and Chief  
Deputy CFO/2010  
Broward County, FL  
Assistant Director of Economic & Small  
Business Development/2010; County  
Attorney/2011; Port Everglades Chief  
Executive/Port Director/2012; Port Everglades  
Director of Business Development/2012  
Sumter County, FL  
Public Works Director/2010; Fire Chief/2011;  
Development Services Director/2012  
San Antonio Housing Authority (SAHA), TX  
Development Services & Neighborhood  
Revitalization Officer/2010 and Director of  
Human Resources & Employee  
Development/2010; Director of Community  
Development Initiatives/2012; Director of  
Information Technology/2012; Chief  
Operations Officer/2012  
SOS Children's Villages - Florida  
Chief Executive Officer/2012  
Virginia Commonwealth University (VCU),  
Richmond, VA  
Police Chief/2010  
New Orleans Redevelopment Authority, LA  
Executive Director/2010  
City of Oak Creek, WI  
City Administrator/2010  
Houston Housing Authority, Houston, TX  
President/CEO/2011  
City of Durham, NC  
Director of Technology Solutions/2010  
City of Fort Lauderdale, FL  
City Manager/2011; City Attorney/2012;  
Building Official/2014  
City of Topeka, KS  
City Manager/2012  
Rochester-Genesee Regional Transportation  
Authority (RGRTA), NY  
Chief Executive Officer (CEO)/2010  
City of Arlington, TX  
Deputy City Manager/2011  
Parks & Recreation Director/2012  
Florida Public Transportation Association  
(FPTA)  
Executive Director/2011  
Early Learning Coalition of Broward County,  
Inc  
Chief Executive Officer/2011  
City of Gainesville, FL  
City Attorney/2012  
Housing Authority of the City of Austin, TX  
President/CEO/2012  
City of Dallas, TX  
Assistant Director of Transportation  
Operations/2012; Assistant Director of Water  
Utilities/2012; City Manager/2013  
El Paso Water Utilities-Public Service Board,  
TX  
President/CEO/2012  
City of Miami Beach, FL  
City Manager/2012  
Louisiana Housing Corporation, LA  
Executive Director/2012  
Children's Board of Hillsborough County  
Executive Director/2012  
Alachua County, FL  
County Manager/2013  
Housing Authority of the City of Brownsville,  
TX  
Chief Executive Officer/2013  
Pasco County, FL  
County Manager/2013  
Lee County, FL  
County Manager/2013; County  
Attorney/2013  
Pinellas Suncoast Transit Authority (PSTA), FL  
Chief Financial Officer/2013  
City of Tallahassee, FL  
Consolidated Dispatch Intergovernmental  
Agency Director, Human Resources Manager,  
Fire Chief, and Director of Airport/2013  
Orange County, FL  
Chief of Corrections  
Hillsborough County, FL Head Start Division  
Director/2013  
City of Quincy, FL  
Finance Director/2013  
Fort Worth Housing Authority, TX  
President/CEO/2013  
Wake County, NC  
County Manager/2013  
Metropolitan Washington Airports  
Authority  
Vice President for Public Safety/2013  
Scott Emergency Communications Center  
(Scott County, Iowa)  
Emergency Services Dispatch Director/2013  
City of Virginia Beach, VA  
Deputy City Manager/2014; Assistant Human  
Services Director/2014  
City of Coconut Creek, FL  
City Attorney/2014  
City of North Port, FL  
City Attorney/2014

## REFERENCES

Clients and candidates provide the best testament of our ability to conduct quality searches. Listed below are a few clients for whom S. Renée Narloch & Associates' recruiters have conducted searches. The average tenure of placements is approximately five years.

CLIENT: City of Coconut Creek, FL  
 REFERENCE: Ms. Mary Blasi, City Manager  
 4800 W Copans Road, Coconut Creek, FL 33063  
 (954) 973-6720; MBlasi@coconutcreek.net  
 POSITION: City Attorney

CLIENT: City of Hallandale Beach, FL  
 REFERENCE: Ms. Nydia Rafols Salleberry, Deputy City Manager  
 400 Federal Hwy, Hallandale Beach, FL 33009  
 (954) 457-1338; Nrafols@hallandalebeachfl.gov  
 POSITION: Finance Director

CLIENT: Wake County (Raleigh), NC  
 REFERENCE: Ms. Angela Crawford, Human Resources Director  
 336 Fayetteville Street, Suite 300, Raleigh, NC 27602  
 (919) 856-6104; Angela.Crawford@wakegov.com  
 POSITION: County Manager

CLIENT: City of Fort Lauderdale, FL  
 REFERENCE: Ms. Maxine Singh, Commission Assistant Coordinator  
 100 N. Andrews Avenue  
 Fort Lauderdale, Florida 33301  
 (954)-828-5005; msingh@fortlauderdale.gov  
 POSITION: City Manager/2011; City Attorney/2012; Building Official/2014

CLIENT: Broward County, FL  
 REFERENCE: Mr. Michael Chasin, Human Resources Manager  
 115 S. Andrews Avenue, Room 520  
 Fort Lauderdale, Florida 33301  
 (954) 357-6434; mchasin@broward.org  
 POSITION: Assistant Director of Economic & Small Business Development/2010; County Attorney/2011; Port Everglades Chief Executive/Port Director/2012; Port Everglades Director of Business Development/2012

## COST

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### PROFESSIONAL FEE AND EXPENSES

The professional fee for conducting this recruitment on behalf of the City of Deltona is \$24,000, including expenses. Services covered by the fee consist of all steps outlined in this proposal, including three (3) days of meetings on site. Expenses include items such as the cost of consultant travel, clerical support, placement of ads, newspaper searches, education verification, as well as credit, criminal, and civil checks. In addition, postage, photocopying, and telephone charges are included and will be allocated. Expenses related to the use of audio/video conferencing equipment for interviews, and candidates' travel for interviews, are the responsibility of the City of Deltona.

### ADDITIONAL RELATED SERVICES

Should the City require services outside of those described in our proposal, services will be based on the hourly rates listed below.

#### Hourly Rates

S. Renée Narloch, President	\$200/hour
Rachel Hanselman, Senior Consultant	\$125/hour
Danielle Pervinich, Senior Consultant	\$125/hour

### CANDIDATE TRAVEL

With respect to candidate travel for interviews, we typically ask candidates to make their travel arrangements and advise them the City will reimburse them directly for reasonable airfare, hotel, and auto expenses, if allowed. We advise candidates what is standard and customary in the industry, as well as the City's expectations and parameters regarding travel. Our experience has been that candidates use discretion and stay within reasonable limits both in pricing and scheduling.

### PAYMENT

We will invoice the City of Deltona monthly for professional fees and expenses for services incurred as of the date of the invoice. We expect payment of invoice within 30 days of receipt by the City. Typically, this results in three monthly invoices of 30% of professional fees and expenses, with a final invoice for the remaining ten percent of professional fees due upon the selection of the finalist.

## UNDERSTANDING OF PROJECT & PROJECT REQUIREMENTS

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### OUR UNDERSTANDING OF THE REQUESTED SERVICES

S. Renée Narloch & Associates is highly qualified to assist the City of Deltona in the recruitment of the new City Manager. We have extensive experience providing recruitment services, ranging from the initial contact with candidates to the successful hiring and placement of candidates.

We are able to successfully manage all aspects of the recruitment process and will work closely with the City to protect the integrity of the recruitment and to ensure a successful outcome. The City can be assured we will place a high priority on this recruitment, and our dedicated staff will provide their full attention throughout the entire recruitment process. Our recruiters have serviced hundreds of public sector clients, and we understand the importance of an objective and thorough process.

### PRIMARY CONTACT

Ms. S. Renée Narloch, President, will conduct the City Manager recruitment for the City of Deltona. Her contact information is as follows:

S. Renée Narloch, President  
 2910 Kerry Forest Pkwy D4-242  
 Tallahassee, FL 32309  
 P: 850.391.0000 | F: 850.391.0002  
 Email: reneen@srnsearch.com  
 Website: www.srnsearch.com

### SMALL BUSINESS/MINORITY BUSINESS

S. Renée Narloch & Associates is by federal and state guidelines considered a small, woman-owned business based on the size of our firm, our annual business earnings and the percentage of ownership held (100%) by a woman/minority.

### STATEMENT OF PROFESSIONAL STANDARDS

S. Renée Narloch & Associates believes in sound and ethical business practices. We understand that confidence and respect are imperative to our success. Our services to clients and candidates involve relationships which depend on good faith efforts. We conduct business forthrightly with no intentional misrepresentations which could mislead clients or candidates. We refrain from using any sourcing techniques that involve deception or falsehood and do not engage in activities which violate antitrust laws.

Communication between us, our clients, and candidates are impartial and accurate, and we make a concerted effort to see that the position, our clients, and candidates are represented honestly and factually. We honor the confidentiality of proprietary information received from clients and candidates and will disclose any knowledge of potential conflicts of interest to client agencies and candidates.

## GUARANTEE

We guarantee that, should the selected candidate be terminated for cause within the first year of employment, we will conduct the search again at no cost (with the exception of expenses) to the City. We are confident in our ability to recruit outstanding candidates and do not expect the City to find it necessary to exercise this provision.

## SCHEDULE

We are available to begin the search for the City Manager immediately, and our current workload is such that we can ensure the City will receive our full attention throughout the entire recruitment process. We will be prepared to make our recommendation regarding finalists within 75 to 90 days from the start of the search. A standard recruitment can typically be completed in less than 16 weeks and follows an approach and schedule similar to the one below:

WEEK	TASK:
1	Conduct meeting with the Mayor, City Commissioners, staff and others involved in the process
2	Develop recruitment brochure and advertisements
3	City reviews recruitment brochure and advertisements
4	Recruitment brochure printed and advertisements placed
5	Active recruitment of candidates begins
9	Closing date
10	Screen resumes
11-12	Recruiter interviews top candidates
12-13	Public records search
14	Review recommendations with the Mayor, City Commissioners, staff and others involved in the process
15	Candidates interview with the City, follow-up interviews, and consultant reference/background checks
16	Candidate selected

## APPROACH & METHOD

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S. Renée Narloch & Associates' unique, client-driven approach to executive search will ensure that the City of Deltona has a pool of high-quality candidates from which to select the new City Manager. Outlined below are the services we provide in our recruitment process.

### DEVELOPING THE CANDIDATE PROFILE

Our understanding of the City's requirements will be the foundation to a successful search. We will work directly with the Mayor, City Commission, and staff and others involved in the process in order to learn as much as possible about what the organization expects of a new City Manager. We can also meet with other key staff or community members to gather input. We want to learn about the values and culture of the organization, as well as to understand the current issues, challenges, and opportunities that face the City of Deltona. We also want to be fully acquainted with the City's expectations regarding the knowledge, skills, and abilities sought in the ideal candidate, and we will work with your organization to identify expectations regarding education and experience. Additionally, we want to discuss expectations regarding compensation and other items necessary to complete the successful appointment of the ideal candidate. The profile that we develop together at this stage will guide our recruitment efforts.

### ADVERTISING CAMPAIGN AND RECRUITMENT BROCHURE

After gaining an understanding of the City's needs, we will design an effective advertising campaign that is appropriate for the recruitment. We will focus on professional journals that are specifically suited to the City Manager search, such as the ICMA Newsletter, utilizing venues that will ensure a diverse pool of applicants, including qualified minority and women candidates. We will also utilize social media and develop a professional recruitment brochure on the City's behalf that will discuss the community, organization, position, and compensation. Once completed, we will mail the brochure to an extensive audience, making them aware of the exciting opportunity with the City of Deltona.

### RECRUITING CANDIDATES

After cross-referencing the profile of the ideal candidate with our database of thousands of candidates and our contacts in the field, we will conduct an aggressive outreach effort that includes making personal calls to prospective applicants in order to identify and recruit outstanding candidates, including qualified minority and women candidates. We realize that the best candidate is often not looking for a new job, and this is the person that we actively pursue to become a candidate. Aggressively marketing the City Manager position to prospective candidates will be essential to the success of the search.

## SCREENING CANDIDATES

Following the closing date for the recruitment, we will screen all resumes using the criteria established in our initial meetings to narrow the field of candidates.

## PRELIMINARY INTERVIEWS

We will conduct preliminary interviews with the top 10 to 12 candidates in order to determine which candidates have the greatest potential to succeed in your organization. During the interviews, we will explore each candidate's background and experience as it pertains to the City Manager position. In addition, we will discuss the candidate's motivation for applying for the position and make an assessment of his/her knowledge, skills, and abilities. We will devote specific attention to determining the likelihood of the candidate's acceptance of the position if an offer of employment is made.

## PUBLIC RECORDS SEARCH

Following the interviews, we will conduct a review of published articles that reference each candidate. Various sources will be consulted, including Lexis-Nexis™, a newspaper/magazine search engine, Google, and local papers from the communities in which the candidates have worked. This brings to our attention any further detailed inquiries that we may need to make at this time.

## RECOMMENDATIONS

Based on the information gathered through meetings with your organization and preliminary interviews with candidates, we will typically recommend three to five candidates for your consideration. We will prepare a detailed, written report on each candidate that focuses on the results of our interviews and public record searches. We will make specific recommendations, but the final selection of those to be considered will be up to you.

## FINAL INTERVIEWS

Our years of experience will be invaluable as we help you to develop an interview process that objectively assesses the qualifications of each candidate. We will adopt an approach that fits your needs, whether it is a traditional interview, multiple interview panel, or assessment center process. We will provide you with suggested interview questions and rating forms, and we will be present at the interviews to facilitate the process. Our expertise lies in facilitating the discussion that can bring about a consensus regarding the final candidates.

We will work closely with your staff to coordinate and schedule interviews and candidate travel. Our goal is to ensure that each candidate has a very positive experience, since the manner in which the entire process is conducted will have an effect on the candidates' perception of your organization.

## BACKGROUND CHECKS/DETAILED REFERENCE CHECKS

Based on final interviews, we will conduct credit, criminal, civil litigation, and motor vehicle record checks for the top one to three candidates. In addition, those candidates will be the subjects of detailed, confidential reference checks. In order to gain an accurate and honest appraisal of the candidates' strengths and weaknesses, we will talk candidly with people who have direct knowledge of their work and management style. We will ask candidates to provide the names of their supervisors, subordinates, and peers for the past several years. Additionally, we will make a point of speaking confidentially to individuals known to have insight into a candidate's abilities, but who may not be on his/her preferred list of contacts. At this stage in the recruitment, we will also verify candidates' educational backgrounds and any required certifications.

## NEGOTIATIONS

We recognize the critical importance of successful negotiations and can serve as your representative during this process. Our experience provides us with insight into current industry standards and expectations in negotiating contracts, and we will be available to advise you regarding current approaches to difficult issues such as housing and relocation. Working to secure the appointment of your chosen candidate, we will represent your interests and advise you regarding salary, benefits, and employment agreements. We have the expertise to turn a very sensitive aspect of the recruitment into one that is viewed positively by both you and the candidate.

## COMPLETE ADMINISTRATIVE ASSISTANCE

Throughout the recruitment, we will provide the City with updates on the status of the search. We will also take care of all administrative details on your behalf. Candidates will receive personal correspondence advising them of their status at each critical point during the recruitment. In addition, we will respond to inquiries about the status of their candidacy within 24 hours. Every administrative detail will receive our attention.

## REFERENCES

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Clients and candidates provide the best testament of our ability to conduct quality searches. Listed below are a few clients for whom S. Renée Narloch & Associates' recruiters have conducted searches. The average tenure of placements is approximately five years.

CLIENT: City of Coconut Creek, FL  
 REFERENCE: Ms. Mary Blasi, City Manager  
 4800 W Copans Road, Coconut Creek, FL 33063  
 (954) 973-6720; MBlasi@coconutcreek.net  
 POSITION: City Attorney  
 MUNICIPALITY SIZE: Approximately 57,000

CLIENT: City of Hallandale Beach, FL  
 REFERENCE: Ms. Nydia Rafols Salleberry, Deputy City Manager  
 400 Federal Hwy, Hallandale Beach, FL 33009  
 (954) 457-1338; Nrafols@hallandalebeachfl.gov  
 POSITION: Finance Director  
 MUNICIPALITY SIZE: Approximately 37,000

CLIENT: Wake County (Raleigh), NC  
 REFERENCE: Ms. Angela Crawford, Human Resources Director  
 336 Fayetteville Street, Suite 300, Raleigh, NC 27602  
 (919) 856-6104; Angela.Crawford@wakegov.com  
 POSITION: County Manager  
 MUNICIPALITY SIZE: Approximately 975,000

CLIENT: City of Fort Lauderdale, FL  
 REFERENCE: Ms. Maxine Singh, Commission Assistant Coordinator  
 100 N. Andrews Avenue  
 Fort Lauderdale, FL 33301  
 (954) 828-5005; msingh@fortlauderdale.gov  
 POSITION: City Manager; City Attorney; Building Official  
 MUNICIPALITY SIZE: Approximately 172,000

CLIENT: Broward County, FL  
 REFERENCE: Mr. Michael Chasin, Human Resources Manager  
 115 S. Andrews Avenue, Room 520  
 Fort Lauderdale, FL 33301  
 (954) 357-6434; mchasin@broward.org  
 POSITION: Assistant Director of Economic & Small Business Development; County  
 Attorney; Port Everglades Chief Executive/Port Director; Port Everglades  
 Director of Business Development  
 MUNICIPALITY SIZE: Approximately 1,839,000

**RFP 15004 Executive Search Firm  
REFERENCES – include in Tab 7**

#1	Agency	City of Coconut Creek, FL	
	Address	4800 W Copans Road	
	City, State, ZIP	Coconut Creek, FL 33063	
	Contact Person	Ms Mary Blasi, City Manager	
	Telephone	(954) 973-6720	Email: MBlasi@cocoutcreek.net
	Date(s) of Service	2014	
	Type of Service	City Attorney Recruitment	
	Comments:		
#2	Agency	City of Hallandale Beach, FL	
	Address	400 Federal Hwy	
	City, State, ZIP	Hallandale Beach, FL 33009	
	Contact Person	Ms. Nydia Rafols Salleberry, Deputy City Manager	
	Telephone	(954) 457-1338; Nrafols@hallandalebeachfl.gov	
	Date(s) of Service	2013	
	Type of Service	Finance Director Recruitment	
	Comments:		
#3	Agency	Wake County, NC	
	Address	336 Fayetteville St, Ste 300	
	City, State, ZIP	Raleigh, NC 27602	
	Contact Person	Ms Angela Crawford, Human Resources Director	
	Telephone	(919) 856-6104; Angela.Crawford@wakegov.com	
	Date(s) of Service	2013	
	Type of Service	County Manager Recruitment	
	Comments:		

**REFERENCES-CONTINUED**

#4	Agency	City of Fort Lauderdale, FL
	Address	100 N Andrews Avenue
	City, State, ZIP	Fort Lauderdale, FL 33301
	Contact Person	Ms Maxine Singh, Commission Assistant Coordinator
	Telephone	(954) 828-5005; msingh@fortlauderdale.gov
	Date(s) of Service	2011/2012/2014
	Type of Service	City Manager Recruitment (2011); City Attorney Recruitment (2012); Building Official (2014)
	Comments:	
#5	Agency	Broward County, FL
	Address	115 S Andrews Avenue, Room 520
	City, State, ZIP	Fort Lauderdale, FL 33301
	Contact Person	Mr. Michael Chasin, Human Resources Manager
	Telephone	(954) 357-6434; mchasin@broward.org
	Date(s) of Service	2010-2012
	Type of Service	Assistant Director of Economic & Small Business Development/2010; County Attorney/2011; Port Everglades Chief Executive/Port Director/2012; Port Everglades Director of Business Development/2012
	Comments:	

<p><b>Submit RFP to:</b></p> <p><b>CITY OF DELTONA</b></p> <p>2345 Providence Blvd. Deltona, Florida 32725 <b>Attn: Purchasing</b></p> <p><b>CLEARLY MARK SEALED ENVELOPE WITH BID NAME AND NUMBER</b></p>	<p><b>REQUEST FOR PROPOSALS # 15004</b></p> <p><b>EXECUTIVE SEARCH FIRM</b></p>
<p><u>Contact:</u></p> <p>Kate Krauss, Purchasing Manager</p> <p>Phone: (386) 878-8100</p> <p>Fax: (386) 878-8571</p>	<p><b>RESPONDENTS</b></p> <p><b>NAME:</b> <u>N P &amp; S Management Inc. dba</u> <u>S. Renée Narloch &amp; Associates</u></p>
<p><u>Responses Due Date &amp; Time:</u></p> <p><b>Tuesday, November 25, 2014 AT 2:00 P.M.</b></p>	<p><b>MAILING ADDRESS:</b> _____</p> <p>2910 Kerry Forest Pkwy D4-242 Tallahassee, FL 32309</p>
<p><u>Location of Public Opening:</u></p> <p>City of Deltona, 1st Floor Conference Room 2345 Providence Blvd., Deltona, FL 32725</p>	<p>_____</p> <p>_____</p> <p>Phone#: (850) 391-0000</p>

**GENERAL CONDITIONS, INSTRUCTIONS AND INFORMATION**

These documents constitute the complete set of terms and conditions, specification requirements, and forms Respondents shall complete and submit the additional required information together with the forms herein in a binder and in the order as they are requested. All responses shall be submitted in a sealed envelope. The face of the envelope shall contain Company's name, return address, the due date and time, the RFP# and title. Companies shall submit **seven typed copies and one unbound original (please do not use three ring binders)** of their response, complete with all supporting documentation. **SUBMITTAL OF A RESPONSE TO THIS REQUEST FOR PROPOSALS CONSTITUTES AN OFFER BY THE COMPANY SUBMITTING RESPONSE.** RFP responses which do not comply with these requirements may be rejected at the option of the City.

**CONTACT: All prospective Respondents are hereby instructed not to contact any member of the City**

**of Deltona Commission, City Manager, or City of Deltona Staff members other than the noted contact person OR another member of the Purchasing staff regarding this Request for Proposals or their response at any time during the RFP process. Any such contact shall be cause for rejection of your response. The RFP/RFQ process is not complete until an award is made.**

**DELAYS:** The City, at its sole discretion, may delay the scheduled due dates indicated above if it is to the advantage of the City to do so. The City will notify bidders of all changes in scheduled due dates by written addendum.

**RFP 15004 Executive Search Firm**

ADDRESS TO:  
 THE CITY OF DELTONA  
 KATE KRAUSS, PURCHASING MANAGER  
 2345 PROVIDENCE BLVD.  
 DELTONA, FLORIDA 32725

I acknowledge receipt of Addenda No (s) \_\_\_\_\_ -  
 I have included:

- Vendor Information Sheet \_\_\_\_\_
- References (Include in Tab 7)
- Non-Collusion Affidavit
- Drug Free Workplace Form
- Conflict of Interest

(Check mark items above, as a reminder that they are included )

Mailing Address: 2910 Kerry Forest Pkwy D4-242, Tallahassee, FL 32309

Telephone: (850) 391-0000

Fax: (850) 391-0002

Date: 11/18/14

Signed: \_\_\_\_\_



Printed Name: S. Renée Narloch

Title: President

## CITY OF DELTONA VENDOR INFORMATION SHEET

The information below is required to complete your proposal packet. Type or print only.

Company Name: N P & S Management Inc. dba S. Renée Narloch & Associates

Address 1: 2910 Kerry Forest Pkwy D4-242

Address 2: \_\_\_\_\_

City: Tallahassee

State: Florida

Zip Code: 32309

Phone Number: (850) 391-0000

Fax Number: (850) 391-0002

Project Contact: S. Renée Narloch, President

e-mail address: info@srnsearch.com

### Remittance (Payment) Mailing Information

Address 1: 2910 Kerry Forest Pkwy D4-242

Address 2: \_\_\_\_\_

City: Tallahassee State: Florida

Zip Code: 32309

Phone Number: (850) 391-0000

Fax Number: (850) 391-0002

Project Contact: S. Renée Narloch, President

e-mail address: info@srnsearch.com

Federal Tax ID No.:  
46-5105865

Tax ID Type:  Federal Tax ID  Social Security Number

**RFP 15004 Executive Search Firm  
REFERENCES – include in Tab 7**

#1	Agency	City of Coconut Creek, FL	
	Address	4800 W Copans Road	
	City, State, ZIP	Coconut Creek, FL 33063	
	Contact Person	Ms Mary Blasi, City Manager	
	Telephone	(954) 973-6720	Email: MBlasi@cocoutcreek.net
	Date(s) of Service	2014	
	Type of Service	City Attorney Recruitment	
	Comments:		
#2	Agency	City of Hallandale Beach, FL	
	Address	400 Federal Hwy	
	City, State, ZIP	Hallandale Beach, FL 33009	
	Contact Person	Ms. Nydia Rafols Salleberry, Deputy City Manager	
	Telephone	(954) 457-1338; Nrafols@hallandalebeachfl.gov	
	Date(s) of Service	2013	
	Type of Service	Finance Director Recruitment	
	Comments:		
#3	Agency	Wake County, NC	
	Address	336 Fayetteville St, Ste 300	
	City, State, ZIP	Raleigh, NC 27602	
	Contact Person	Ms Angela Crawford, Human Resources Director	
	Telephone	(919) 856-6104; Angela.Crawford@wakegov.com	
	Date(s) of Service	2013	
	Type of Service	County Manager Recruitment	
	Comments:		

**REFERENCES-CONTINUED**

#4	Agency	City of Fort Lauderdale, FL
	Address	100 N Andrews Avenue
	City, State, ZIP	Fort Lauderdale, FL 33301
	Contact Person	Ms. Maxine Singh, Commission Assistant Coordinator
	Telephone	(954) 828-5005; msingh@fortlauderdale.gov
	Date(s) of Service	2011/2012/2014
	Type of Service	City Manager Recruitment (2011); City Attorney Recruitment (2012); Building Official (2014)
	Comments:	
#5	Agency	Broward County, FL
	Address	115 S Andrews Avenue, Room 520
	City, State, ZIP	Fort Lauderdale, FL 33301
	Contact Person	Mr. Michael Chasin, Human Resources Manager
	Telephone	(954) 357-6434; mchasin@broward.org
	Date(s) of Service	2010-2012
	Type of Service	Assistant Director of Economic & Small Business Development/2010; County Attorney/2011; Port Everglades Chief Executive/Port Director/2012; Port Everglades Director of Business Development/2012
	Comments:	

**DRUG-FREE WORKPLACE FORM**

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that:

S. Renée Narloch & Associates  
(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 (Florida Statutes) or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, or any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

S. Renée Narloch, President

**Proposer's Signature**

11/18/14

**Date**

**NOTARY PUBLIC**

My Commission Expires:



**NON-COLLUSION AFFIDAVIT**

I, S. Renée Narloch, depose and say that:  
1 I am President of the firm of S. Renée Narloch & Associates,  
the firm submitting the response described in this Request for Proposals for:

RFP 14017 Auditing Service and that I executed the said response with full authority to do so:

- 2. the prices in this bid have been arrived at independently without collusion, consultation, communication or agreement for the purpose of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor;
- 3. unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to bid opening, directly or indirectly, to any other bidder or to any competitor; and
- 4. no attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit, or not to submit, a bid for the purpose of restricting competition;
- 5. the statements contained in this affidavit are true and correct, and made with full knowledge that the City of Deltona relies upon the truth of the statements contained in this affidavit in awarding contracts for said project.

Signature of Bidder: *S. Renée Narloch* Date: 11/18/14  
STATE OF: Florida CITY OF: Tallahassee

PERSONALLY APPEARED BEFORE ME, the undersigned authority,  
who, after first being sworn by me, (name of individual signing) affixed his/her signature in the  
space provided above on this 20 day of 2014

**NOTARY PUBLIC**  
My Commission Expires: *[Signature]*



**LOBBYING AND CONFLICT OF INTEREST CLAUSE  
ETHICS CLAUSE**

“ “

(Company)

“ S. Renée Narloch & Associates warrants that he/it has not employed, retained or otherwise had act on his/its behalf any former City officer or employee or any City officer or employee. For breach or violation of this provision the City may, in its discretion, terminate this contract without liability and may also, in its discretion, deduct from the contract or purchase price, or otherwise recover, the full amount of any fee, commission, percentage, gift, or consideration paid to the former City officer or employee”.

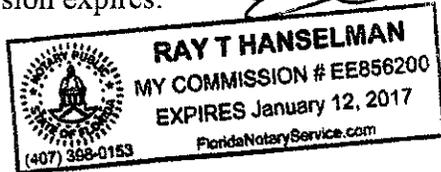
Signature *S. Renée Narloch*  
Date: 11/20/14

STATE OF: Florida CITY OF: Tallahassee  
Subscribed and sworn to (or affirmed) before me on (date) by (name of affiant). He/She is personally known to me or has produced as identification. (type of identification)

**NOTARY PUBLIC**

My commission expires:

*[Handwritten Signature]*



**Submission of Proposals**

**CITY OF  
DELTONA**

Executive  
Search Services

**CITY MANAGER**

November 21, 2014



**The Mercer Group, Inc.**

*Consultants To Management*

# **CITY of DELTONA FLORIDA**

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## **Proposal for Executive Search Services**

## **CITY MANAGER**

**November 21, 2014**

### **THE MERCER GROUP, INC.**

**W. D. Higginbotham, Jr.**

**Senior Vice President**

**9123 Cherry Trace**

**Seminole, Florida 33777-1150**

**727-214-8673**

**[WDHiggin@mercergroupinc.com](mailto:WDHiggin@mercergroupinc.com)**

**[www.mercergroupinc.com](http://www.mercergroupinc.com)**

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B. Non-Collusion Affidavit	
C. Drug-Free Workplace Form	
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## **EXECUTIVE SUMMARY**

The Mercer Group, Inc. is pleased to submit this Executive Summary with our proposal to the City of Deltona to conduct an executive search and selection process for a new City Manager.

We are quite active in the public and private sectors, either currently conducting or having just completed searches for positions for many public sector organizations around the country, including the City of Plant City. Our proposal lists various City and County Manager searches we have successfully completed.

Because we have recently completed similar searches, we can move quickly to meet your needs. Further, we will be working out of our Seminole, Florida office. This allows us to bring total objectivity to a search such as the one the City of Deltona is contemplating.

This Executive Summary should provide you with the overview information that you need relative to our firm's qualifications to conduct an executive search for a new City Manager for the City of Deltona.

### **Our Approach**

We will meet with the City and others of your choice to determine the objectives relative to the search and conduct the search as follows:

1. Analyze and update the Position Profile previously developed for this position.
2. Recruit for the position on a regional and national basis.
3. Invite candidates to apply who meet the criteria established by the City of Deltona.
4. Review and screen applications.
5. Conduct interviews and background checks of selected candidates.
6. Recommend a list of qualified finalists with write-ups, suggested questions, etc.
7. Coordinate final interviews, provide candidate evaluations, conduct preliminary and final background checks, negotiation and follow-up.

### **Schedule**

Our search process normally takes about 90 to 120 days from our first meeting regarding the Position Profile. The more time we have, within reason, the more effectively we can conduct thorough evaluation and background checks on finalist candidates.

### **Firm Qualifications and Staffing**

The Mercer Group, Inc. has been in operation for over twenty four years with our corporate headquarters in Atlanta and branch offices in thirteen (13) states, including **Pinellas County Florida**. The Mercer Group, Inc. has the resources available to conduct this search and avoid untimely delays in the process. With over 30 years of public sector experience, 23 of which is in Florida, the Project Manager for this recruitment will be W. D. Higginbotham, Jr. in our Seminole, Florida office; he is uniquely qualified to lead this search for the new City Manager.

---

The Mercer Group, Inc. for the City Manager of Deltona, Florida

### Code of Ethics

Mr. Higginbotham is an active member of the International City and County Management Association (ICMA) and Mr. Higginbotham subscribes to ICMA's Code of Ethics.

### Guarantees

We offer several guarantees of our work. The five most important are:

1. We will keep working until the placement is made.
2. We will never recruit a candidate whom we have placed in a client organization as long as he/she is employed by that organization without the full agreement of the client.
3. We will not recruit candidates from your organization for two years after completion of a search assignment.
4. We will not present a candidate simultaneously to more than one client. This permits our firm to represent one client organization without any conflicts of interest.
5. If the selected candidate leaves your employ within the first two years, we will redo the search for expenses only; The Mercer Group will not charge for our services.

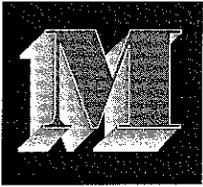
### Reasonable Fees

Our fees to conduct a search of this type are competitive and are outlined in detail later in the proposal. The Mercer Group, Inc. proposes a **total flat fee, including all expenses, for the Executive Search/Recruitment Services as a fixed amount of \$14,750.** There will be **NO additional costs or expenses paid to The Mercer Group, Inc. for our services.**

### References

We have provided local and national references of our work in the following proposal. Please contact Mr. Higginbotham at 727-214-8673.

Thank you for the opportunity to present our proposal and qualifications. We look forward to hearing from you.



# The Mercer Group, Inc.

*Consultants To Management*

9123 Cherry Trace

Seminole, FL 33777

(954) 894-4046

Cell (727) 214-8673

E-mail: [wdhiggin@bellsouth.net](mailto:wdhiggin@bellsouth.net)

November 21, 2014

Kate Krauss, CPPO, CPPB, SPSM  
 Purchasing Manager  
 Deltona City Hall  
 2345 Providence Boulevard  
 Deltona, FL 32725

The Mercer Group, Inc. understands the City of Deltona's Mayor and City Commission wish to engage the services of an executive search firm to conduct executive search and recruiting services for a City Manager for the City of Deltona.

The Mercer Group, Inc. is pleased to submit our proposal to assist the Mayor and City Commission to recruit exceptionally well-qualified candidates for the position of City Manager. If selected to conduct the search and recruitment process for this position, we would have no difficulty beginning immediately to ensure a smooth process. It is our understanding that the scope of work, minimum responsibilities, and search and recruitment services shall include, but not be limited to, the following:

- Development of Candidate Profile and Recruitment.
- Strategy Outreach to best-fit candidates and Advertising Campaign.
- Candidate Screening.
- Candidate selection, background and offer.
- Appointment.

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

- To conduct on-site needs assessment for the new City Manager.
- To develop a comprehensive position profile.
- To encourage top level people to apply who would otherwise be reluctant to respond to an advertisement.
- To save a considerable amount of the Mayor and City Commission's time in establishing a position profile and reviewing applicants.
- To comply with appropriate personnel regulations and state laws (i.e., EEO, Affirmative Action and ADA).
- To independently and objectively assess the qualifications and suitability of candidates for the position.
- To recommend a pool of finalist candidates to the Mayor and City Commission.

City of Deltona  
 Page Two  
 November 21, 2014

- To coordinate finalist candidate interviews with the Mayor and City Commission.
- To mail an information packet supplied by the City to all qualified applicants.
- To respond to all candidate inquiries and produce all correspondence during the search.
- To preserve the confidentiality of inquiries to the degree possible under Florida law.
- To assist the Mayor and City Commission in reaching a final decision.
- To assist in negotiating a compensation package with the successful candidate on behalf of the Mayor and City Commission.
- To keep the Mayor and City Commission closely involved in key decisions and informed of our progress.

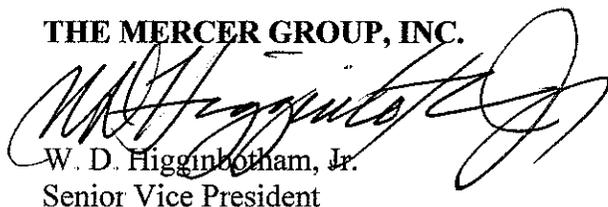
The purpose for engaging the services of an executive search firm is to seek out and recruit experienced candidates and to assist the Mayor and City Commission in selecting highly qualified individuals who meet the profile and needs of the City and who might not otherwise apply. The Mercer Group, Inc. is well-qualified to assist the Mayor and City Commission with this project. During the last six (6) months alone we have successfully completed or we are currently conducting searches for the City of St. Pete Beach, the City of St. Petersburg, Hillsborough County, the City of Plant City (Police Chief and City Manager), Citrus County, Pinellas Suncoast Transit Authority (PSTA) and Tampa Bay Area Regional Transportation Authority (TBARTA). These are just the **Florida** recruitments; there are many more in the Southeast and nation-wide.

The Mercer Group, Inc. has been in operation for over twenty four years with our corporate headquarters in Atlanta and branch offices in thirteen (13) states, including **Pinellas County Florida**. The Mercer Group, Inc. has the resources available to conduct this search and avoid untimely delays in the process. If selected, I will personally lead this recruitment from our Seminole, Florida office; with 30 years of local government experience, including four (4) City Manager positions in Florida, I am uniquely qualified to lead this search for Deltona's new City Manager.

Thank you for the opportunity to respond to this important assignment. We will be pleased to discuss our proposal with the Mayor and City Commission and urge you to allow us to do so. Please contact me directly at 727-214-8673 if you have any questions.

Sincerely yours,

**THE MERCER GROUP, INC.**



W. D. Higginbotham, Jr.  
 Senior Vice President

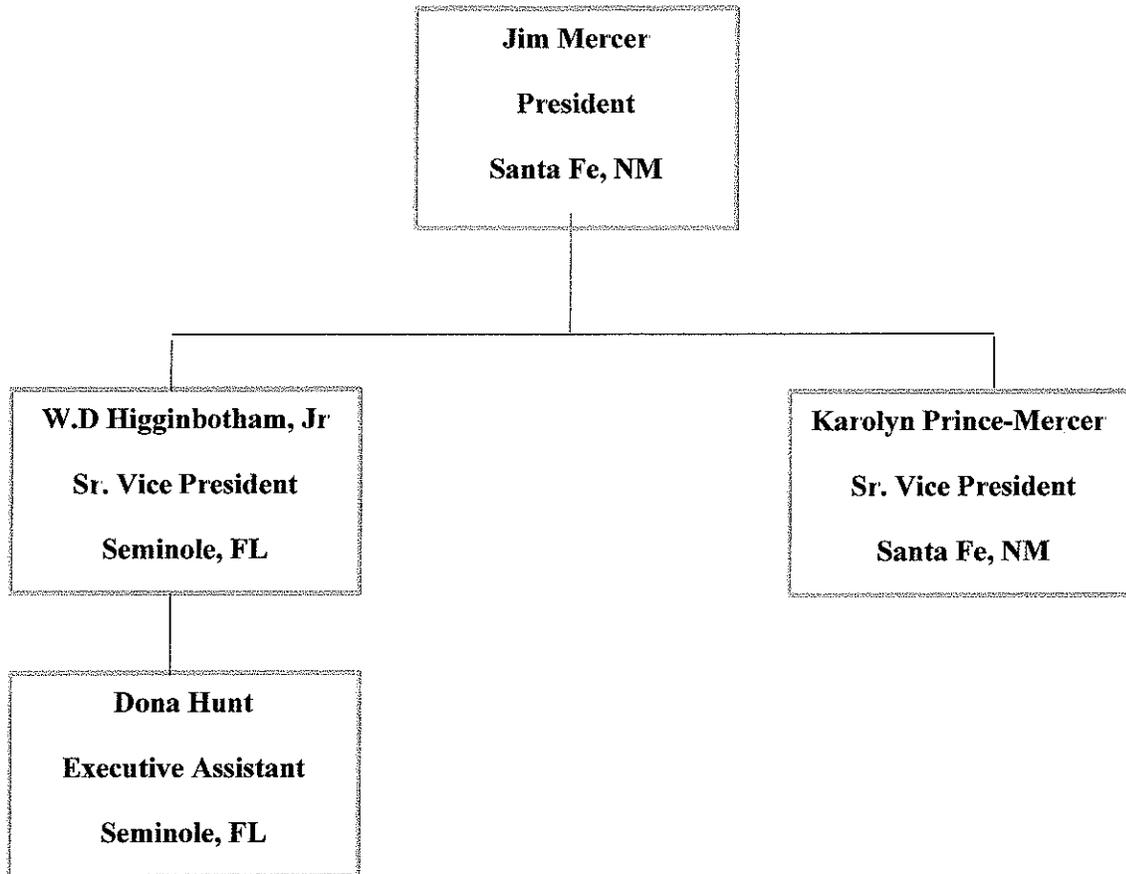
**THE MERCER GROUP, INC.**

## II. Prior Experience and Success

### Organizational Chart for the City of Deltona Search Team

# The Mercer Group, Inc.

## EXECUTIVE SEARCH TEAM for DELTONA CITY MANAGER



## **Resumes of Our Key Staff**

### **1. James L. Mercer, President - Atlanta and Santa Fe Offices; Project Support**

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

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

### **2. W. D. Higginbotham, Jr., Senior Vice President – Seminole, Florida Office; Project Lead**

Mr. Higginbotham's distinguished public sector career of over 30 years has included serving as chief executive officer and chief financial officer of cities in Florida and California. He served as City Manager of Gainesville, Florida, Melbourne Beach, Florida, Surfside, Florida, and Madeira Beach, Florida ranging in population from 3,100 to 123,100 and Assistant City Manager and CFO in Bakersfield, California with a population of 352,400. Mr. Higginbotham also served eight years as the Director of Economic Development for the eleven (11) county, 7,000 square mile area of the North Central Florida Regional Planning Council. After being recruited by the International City/County Management Association (ICMA) on behalf of the Department of Defense, his service to Florida cities was briefly interrupted in late 2007 and early 2008 when he served in Baghdad, Iraq as a member of the United States Provincial Reconstruction Team. He is an active member of ICMA and the Florida City and County Management Association (FCCMA) and has been recognized by both organizations for over 25 years in the local government management profession.

Mr. Higginbotham's particular areas of expertise are executive search, organizational development and economic development. In addition to graduating from Tulane University where he earned his Certificate in Accounting, he has completed and instructed training programs at the Emergency Management Institute (FEMA) in Emmitsburg, Maryland in Disaster Preparedness and Disaster Resistant Jobs Training, TRAIN-THE-TRAINER.

### **3. Karolyn Prince-Mercer, Senior Vice President - Santa Fe Office; Project Support**

Ms. Prince-Mercer received her Bachelor of Arts degree in History with minors in Art, Political Science and Education from the University of Nevada. She received her Doctor of Jurisprudence degree from Woodrow Wilson College of Law. She is licensed to practice law in New Mexico and in Georgia. She has practiced law for over 20 years beginning in Georgia. Ms. Prince-Mercer is also qualified to administer and interpret the Myers-Briggs Type Indicator (MBTI) instruments.

Ms. Prince-Mercer also specializes in public sector executive search. She has been in management consulting for over eighteen years. She has experience working in executive search and has conducted several city manager searches. She has worked on several city managers/administrators searches with Mr. Mercer over the past years. She also has experience with compensation and classification, and with organization and management studies. Ms. Prince-Mercer is also active in recruitment for other fields in the public sector.

### **4. Time Commitments**

Our firm members have the quality time to devote to this search so as to meet Deltona's Mayor and City Commission's needs.

**BALANCE OF THIS PAGE INTENTIONALLY LEFT BLANK**

### III. Past Performance

#### Firm Qualifications

The Mercer Group, Inc. is an independent management consulting firm incorporated in the State of Georgia and operating nation-wide. The firm was founded by James L. Mercer, a long-term public management consultant. The firm has conducted business under the name The Mercer Group, Inc. since February, 1990.

Mr. Mercer started his own firm in 1981 and, in 1984, merged it with another consulting firm, Wolfe & Associates, Inc. On June 1, 1986, Mr. Mercer acquired the Human Resource and Organizational Consulting Practice of Wolfe & Associates, Inc. This acquisition formed the basis for Mercer, Slavin & Nevins, Inc. He sold his interest in Mercer, Slavin & Nevins, Inc. early in 1990 and founded The Mercer Group, Inc.

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

While this important engagement for the City of Deltona will be personally led by W. D. Higginbotham, Jr., it will be assisted and supported by James L. Mercer. Mr. Mercer has conducted or assisted in the conduct of more than 2,000 successful executive searches in recent years. The spectrum of our search experience is below. Mr. Mercer's resume is included below, as is Mr. Higginbotham's.

Mr. Mercer is the Chief Executive Officer of our firm. There is no parent, subsidiary or affiliation of other firms. The closed service office and our corporate headquarters are as follows:

The Mercer Group, Inc.  
5579 B Chamblee Dunwoody Road, Suite 511  
Atlanta, Georgia 30338  
Telephone: (770) 551-0403; FAX: (770) 399-9749  
Federal Tax ID No.: 58-1877068

Primary contact information is as follows:

The Mercer Group, Inc.  
W. D. Higginbotham, Jr.  
Senior Vice President  
9123 Cherry Trace  
Seminole, Florida 33777  
727-214-8673  
[WDHiggin@mercergroupinc.com](mailto:WDHiggin@mercergroupinc.com)  
[www.mercergroupinc.com](http://www.mercergroupinc.com)

**Clients**

Kenneth W. Buchman, City Attorney  
 City of Plant City; population 35,000  
 302 W. Reynolds Street  
 Plant City, FL 33563  
 813-659-4242

**kbuchman@plantcitygov.com**

City Manager Search; Police Chief Search

Christopher M. Guella, Director of Human Resources  
 City of St. Petersburg; population 249,688  
 P. O. Box 2842  
 St Petersburg, FL 33713  
 727-893-7419

**chris.guella@stpete.org**

Police Chief Search

Stephen W. Vaughn, Secretary/Executive Director  
 Pennsylvania Municipal Retirement System  
 Commonwealth of Pennsylvania; population 12,773,801  
 1010 7<sup>th</sup> Street, Suite 301  
 Harrisburg, PA 17102  
 717-787-2065

**stvaughn@pa.gov**

Secretary/Executive Director Search

Mr. Russell Blackburn, City Manager  
 City of Gainesville; population: 124,354  
 200 East University Avenue  
 Gainesville, FL 32601  
 352-334-5010

**blackburnrd@cityofgainesville.org**

City Manager Search; Risk Management Director Search; Utility Engineer Search

Mayor Wes Perry  
 City of Midland; population: 103,880  
 300 N Loraine Avenue  
 Midland, TX 79701  
 432-686-5000

**wes@egresources.com**

City Manager Search

Mayor (Dr.) Robert Cluck  
 City of Arlington; population: 364,000  
 101 W Abram Street  
 Arlington, TX 76004  
 817-459-6122

**robert.cluck@arlingtontx.gov**

City Manager Search

#### IV. Cost Proposal

##### Cost Proposal for Professional Recruitment Services for City Manager

The Mercer Group, Inc. proposes a **total fee, including all expenses, for the Executive Search/Recruitment Services as a fixed amount of \$14,750.** There will be **NO additional costs or expenses paid to The Mercer Group, Inc. for our services.** Items and their associated costs for our services are as follows:

Position Analysis.....	\$ 1,750
Outreach Campaign.....	2,500
Resume Review.....	2,500
Candidate Screening.....	2,750
Background Investigation.....	3,250
Interview Process.....	1,500
Negotiation and Follow-up.....	500
<b>TOTAL FEE.....</b>	<b>\$14,750</b>

The costs for final candidates to travel to Deltona for interviews, as the Mayor and City Commission desire, are not included. Such costs are normally paid by the client on a reimbursement basis, directly to the candidates. These costs are extremely difficult to estimate because they depend on where the candidates are located. In general, out-of-state costs run about \$600 to \$750 per person.

Deltona's liability to The Mercer Group, Inc. for services rendered under our agreement **will not exceed the agreed upon price as stated above.**

We will submit regular invoices for our fees. It is our practice to bill one-third at the start of the search, one-third upon delivery of the semi-finalist application materials, and one-third upon selection of the successful candidate.

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

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

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

The hourly rate for any services outside the scope of items set forth in this proposal is \$125.00.

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

## V. & VI. Project Understanding, Approach/Method and The Mercer Group Guarantees

### Project Understanding and Approach

It is our understanding that the City of Deltona's Mayor and City Commission are in need of Executive Search Services for City Manager Recruitment. We further understand that the scope of work, minimum responsibilities, and search and recruitment services shall include, but not be limited to, the following:

- Development of Candidate Profile and Recruitment.
- Strategy Outreach to best-fit candidates and Advertising Campaign.
- Candidate Screening.
- Candidate selection, background and offer.
- Appointment.

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

- To conduct on-site needs assessment for the new City Manager.
- To develop a comprehensive position profile.
- To encourage top level people to apply who would otherwise be reluctant to respond to an advertisement.
- To save a considerable amount of the Mayor and City Commission's time in establishing a position profile and reviewing applicants.
- To comply with appropriate personnel regulations and state laws (i.e., EEO, Affirmative Action and ADA).
- To independently and objectively assess the qualifications and suitability of candidates for the position.
- To recommend a pool of finalist candidates to the Mayor and City Commission.
- To coordinate finalist candidate interviews with the Mayor and City Commission.
- To mail an information packet supplied by the City to all qualified applicants.
- To respond to all candidate inquiries and produce all correspondence during the search.
- To preserve the confidentiality of inquiries to the degree possible under Florida law.
- To assist the Mayor and City Commission in reaching a final decision.
- To assist in negotiating a compensation package with the successful candidate on behalf of the Mayor and City Commission.
- To keep the Mayor and City Commission closely involved in key decisions and informed of our progress.

The scope of the project will be sufficiently broad and in-depth so as to meet the requirements of the Mayor and City Commission. Our approach and style are interactive; we form a partnership with our client to conduct a project from which the City will benefit through ease of implementation.

## **Work Plan; Outreach, Candidate Screening, Background Work, Interview & Follow Up**

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

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

### **1. Position Analysis**

We will have extensive consultation with Deltona's Mayor and City Commission and/or key staff as well as other individuals or groups (as the Mayor and City Commission wish) to determine the City's vision/mission, goals and objectives, the needs and issues, requirements of the job, and to obtain information about the environment within which the position functions.

During this process, we will initiate individual interviews with citizen organizations, department heads and key staff, and others of your choice to identify expectations, perceptions, and concerns regarding the position. In addition, we will spend a considerable amount of time at the beginning of the process with the Mayor and City Commission (and others as desired) in order to determine the level of experience and training needed. As noted earlier, Mr. Higginbotham's 30 years of local government experience make him uniquely qualified to lead this search for the new City Manager.

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

### **2. Recruitment Process**

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

Although this process is valuable, we will rely most heavily on our own contacts in the public safety and administration/management field and on our own experience. Through "networking", we will conduct a nation-wide search for the best qualified candidates and invite them to apply for the position.

Based on our discussions with the Mayor and City Commission, we will place ads in professional journals, online at appropriate websites that specialize in and attract high quality public safety management attention, and in various minority and women's publications to encourage applicants to apply.

### **3. Resume Review**

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

### **4. Candidate Screening**

Criteria for the preliminary screening will be contained in the approved "Recruitment Profile". They may include such items as education, technical knowledge, experience, accomplishments, management style, personal traits, etc.

Screening of candidates against those criteria will be based on data contained in the resumes and other data provided by the candidates and on our knowledge of the organizations in which they work. At this stage, each must meet the minimum qualifications specified in the Recruitment Profile.

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

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

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

We also request that all candidates provide us, in writing, substantial information about their accomplishments and their management style and philosophy; this information will be verified.

## **5. Background Investigations**

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

We ask each candidate to provide us with a large number of references. We then network these references to other persons who know the candidate. In this way, we thoroughly evaluate each candidate. We have had occasion to talk to more than 20 references concerning a single finalist candidate. These references and evaluations are combined to provide frank and objective appraisals of the top candidates. We also verify past employment difficulties, if any, including reasonable due diligence on any legal action filed against current or former employers.

As part of our evaluation process, we verify undergraduate and graduate college degrees. We arrange for credit checks, criminal checks, and, as an additional option, can arrange for psychological (or similar) testing of the candidates that may be desired. As a part of this project we can provide the results of a management style inventory on the finalist candidates. We can also conduct a Myers-Briggs analysis of the team with the new team member for team building purposes (these may be extra cost items). We will present and discuss background investigation criteria with the City which will make the final decision on which candidates to interview.

## **6. Interview Process**

Based on the preceding steps, a recommended list of finalists for the position of City Manager will be compiled. We will prepare a written summary on each finalist. The information will cover, but not be limited to, 1) present position, 2) total years experience, 3) salary requirements, 4) education, 5) previous positions held, 6) notable projects, 7) management style, 8) skills and abilities, 9) interests, and 10) professional goals.

This information will be presented to the Mayor and City Commission in a detailed written format combined with the results of the background investigation and candidate screening. We will make a recommendation on a group of finalists, the size of which as directed by the Mayor and City Commission. The Mayor and City Commission shall make the final decision on which and how many candidates will be interviewed.

Our report will be presented in a meeting in which we will discuss our recommendations and provide background information, sample questions and a rating form for the interviews. In particular, we will explain which, if any, of the applicants specifically meet the total criteria established by the Mayor and City Commission or whether the final group simply represents the best available talent.

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

## **7. Negotiation and Follow-up**

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

We will properly handle any and all media relations. Unless otherwise directed, it is our standard practice to tell all media that we are working on behalf of the City of Deltona and that any public statement should come directly from the Mayor and City Commission. We will maintain confidentiality of candidate information, as possible, under Florida law.

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

We will keep the Mayor and City Commission closely informed and involved in decisions concerning the search process at all times. We will prepare and send weekly e-mail updates and a formal progress report at the mid-point of the search. These reports will contain a progress report on the recruitment and specific steps to be taken to meet the City's deadlines.

Support from the City of Deltona and the Mayor and City Commission will be needed, as follows:

- Arranging interviews with Deltona's Mayor and City Commissioners and others as desired.
- Providing budget, organization charts and other documents.
- Place of contact for the search.

## **Equal Employment Opportunity Statement**

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

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

## THE MERCER GROUP, INC.

### GUARANTEES

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

1. **Client Organization:** The client is defined as the entire entity, including all departments, divisions, sections and groups. This assures that all of our guarantees apply to the entire client organization.
2. **Two-Year Off Limits:** We will not recruit candidates from a client organization for two years after completion of a search assignment without the full agreement of the client.
3. **Placement Off Limits Forever:** We will never recruit a candidate whom we have placed in a client organization as long as he/she is employed by that organization without the full agreement of the client.
4. **Continue the Search:** If, for any reason, the client does not feel comfortable selecting a candidate from our original recommended group of candidates, we will continue the search until the client can make a selection.
5. **Replacement of Successful Candidate:** If the candidate we place with the client leaves the client organization **for any reason** during the 24 month period following the date of placement with the client, we will replace the candidate and **there will be no professional fees** charged by The Mercer Group to make the new placement.
6. **Parallel Candidate Presentation:** We will not present a candidate simultaneously to more than one client. This permits our firm to represent one client organization without any conflicts of interest.
7. **Client Conflicts:** If asked, we will disclose to our clients the names of the organizations which are "Off Limits" that logically would be target organizations on the new search assignment.
8. **Deceptive/Misleading Search Techniques:** We commit to our clients and to our prospective candidates that we will not use any search techniques which may be considered as deceptive or misleading.
9. **Resume Floating:** We will not float resumes to organizations in the hopes that we can collect a fee if that individual is hired.
10. **Not Represent Individuals:** We assure our clients and individuals who may become candidates that we will not collect a fee from candidates whom we may recommend for a position.

## VII. References

Kenneth W. Buchman, City Attorney  
 City of Plant City; population 35,000  
 302 W. Reynolds Street  
 Plant City, FL 33563  
 813-659-4242  
[kbuchman@plantcitygov.com](mailto:kbuchman@plantcitygov.com)  
 City Manager Search; Police Chief Search

Sherry Anderson, Human Resource Director  
 Citrus County Board of County Commissioners; population 140,000  
 3600 W. Sovereign Path  
 Lecanto, FL 34461  
 352-400-0145  
[SHERRY.ANDERSON@bocc.citrus.fl.us](mailto:SHERRY.ANDERSON@bocc.citrus.fl.us)  
 County Administrator

Mayor Alonzo King  
 City of Goldsboro; population: 38,313  
 City Hall, 200 North Center Street  
 Goldsboro, NC 27530  
 c/o [mbrewer@ci.goldsboro.nc.us](mailto:mbrewer@ci.goldsboro.nc.us)  
 City Manager Search

Stephen W. Vaughn, Secretary/Executive Director  
 Commonwealth of Pennsylvania; population 12,773,801  
 Pennsylvania Municipal Retirement System  
 1010 7<sup>th</sup> Street, Suite 301  
 Harrisburg, PA 17102  
 717-787-2065  
[stvaughn@pa.gov](mailto:stvaughn@pa.gov)  
 Secretary/Executive Director Search

Mayor Wes Perry  
 City of Midland; population: 103,880  
 300 N Loraine Avenue  
 Midland, TX 79701  
 432-686-5000  
[wes@eglresources.com](mailto:wes@eglresources.com)  
 City Manager Search

Mayor (Dr.) Robert Cluck  
 City of Arlington; population: 364,000  
 101 W Abram Street  
 Arlington, TX 76004  
 817-459-6122  
[robert.cluck@arlingtontx.gov](mailto:robert.cluck@arlingtontx.gov)  
 City Manager Search

# APPENDIX



## CITY OF DELTONA VENDOR INFORMATION SHEET

The information below is required to complete your proposal packet. Type or print only.

Company Name: The Mercer Group, Inc.

Address 1: 9123 Cherry Trace

Address 2: \_\_\_\_\_

City: Seminole

State: Florida

Zip Code: 33777

Phone Number: 727-214-8673

Fax Number: 770-399-9749

Project Contact: W. D. Higginbotham, Jr.

e-mail  
address: WDHiggin@mercergoupinc.com

### Remittance (Payment) Mailing Information

Address 1: 1000 Cordova Place #726

Address 2: \_\_\_\_\_

City: Santa Fe State: New Mexico

Zip Code: 87505

Phone Number: Same as above

Fax Number: Same as above

Project Contact: Same as above

e-mail address: Same as above

Federal Tax ID No.: 58-1877068

Tax ID Type:  Federal Tax ID  Social Security Number

**NON-COLLUSION AFFIDAVIT**

I, W. D. Higginbotham, Jr., depose and say that:

1. I am Senior Vice President of the firm of The Mercer Group, Inc., the firm submitting the response described in this Request for Proposals for:

RFP 14017 Auditing Service and that I executed the said response with full authority to do so:

2. the prices in this bid have been arrived at independently without collusion, consultation, communication or agreement for the purpose of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor;

3. unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to bid opening, directly or indirectly, to any other bidder or to any competitor; and

4. no attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit, or not to submit, a bid for the purpose of restricting competition;

5. the statements contained in this affidavit are true and correct, and made with full knowledge that the City of Deltona relies upon the truth of the statements contained in this affidavit in awarding contracts for said project.

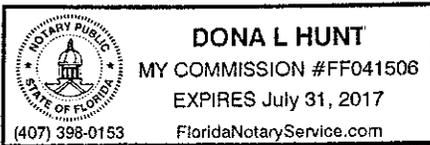
Signature of Bidder: *W. D. Higginbotham, Jr.* Date: November 21, 2014

STATE OF: Florida CITY OF: Seminole

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, (name of individual signing) affixed his/her signature in the space provided above on this 21 day of November, 2014

**NOTARY PUBLIC**

My Commission Expires: July 31, 2017



*Dona L. Hunt*

Dona L. Hunt

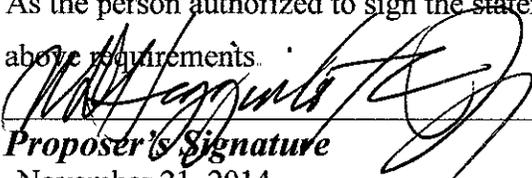
**DRUG-FREE WORKPLACE FORM**

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that:

The Mercer Group, Inc.  
(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 (Florida Statutes) or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, or any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

  
**Proposer's Signature**  
 November 21, 2014

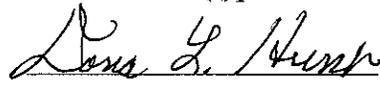
**Date**

STATE OF: Florida CITY OF: Seminole

Subscribed and sworn to (or affirmed) before me on (date) by (name of affiant). He/She is personally known to me or has produced as identification. (type of identification)

NOTARY PUBLIC

My Commission Expires: July 31, 2017

  
 \_\_\_\_\_



**LOBBYING AND CONFLICT OF INTEREST CLAUSE  
ETHICS CLAUSE**

“ “

(Company)

“ The Mercer Group, Inc. warrants that he/it has not employed, retained or otherwise had act on his/its behalf any former City officer or employee or any City officer or employee. For breach or violation of this provision the City may, in its discretion, terminate this contract without liability and may also, in its discretion, deduct from the contract or purchase price, or otherwise recover, the full amount of any fee, commission, percentage, gift, or consideration paid to the former City officer or employee”.

Signature *[Handwritten Signature]*

Date: November 21, 2014

STATE OF: Florida CITY OF: Seminole

Subscribed and sworn to (or affirmed) before me on (date) by (name of affiant). He/She is personally known to me or has produced as identification. (type of identification)

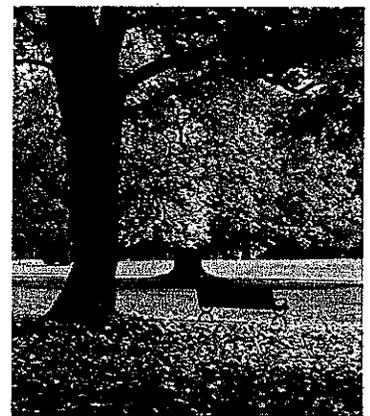
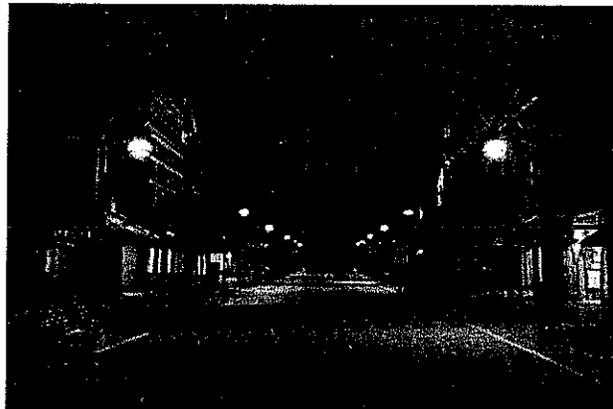
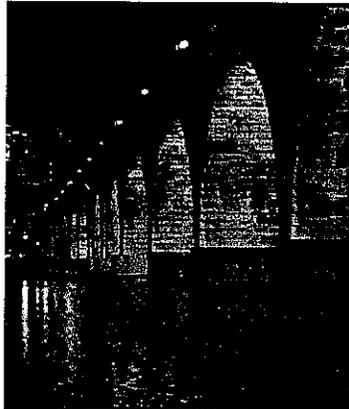
**NOTARY PUBLIC**

My commission expires: July 31, 2017



*Dona L. Hunt*

**Submission of Proposals**



# Proposal

**City of Deltona, Florida**

Proposal to Provide Executive Search Services

November 25, 2014

**RFP 15004 Executive Search Firm**

ADDRESS TO:  
 THE CITY OF DELTONA  
 KATE KRAUSS, PURCHASING MANAGER  
 2345 PROVIDENCE BLVD.  
 DELTONA, FLORIDA 32725

I acknowledge receipt of Addenda No.(s) \_\_\_\_\_ -

I have included:

- Vendor Information Sheet
- References (Include in Tab 7)
- Non-Collusion Affidavit
- Drug Free Workplace Form
- Conflict of Interest

(Check mark items above, as a reminder that they are included.)

Mailing Address: 14285 Midway Road, Suite 340, Addison, Texas 75254

Telephone: 972-481-1950

Fax: 972-481-1951

Date: November 21, 2014

Signed: Andrea Sims

Printed Name: Andrea Sims

Title: Vice President

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## LETTER OF TRANSMITTAL

November 25, 2014

Ms. Kate Krauss, CPPO, CPPB, SPSM  
 Purchasing Manager  
 City of Deltona  
 2345 Providence Blvd  
 Deltona, FL 32725

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

Dear Ms. Krauss,

I appreciate the opportunity to submit our proposal for executive recruitment services for the City of Deltona's next City Manager. Our extensive experience in providing executive recruitment services to cities, counties, non-profits, special districts and other public sector organizations nationwide, especially in Central Florida with the Cities of Eustis and Sanford, will be beneficial for this recruitment and allow us to find the ideal candidate for the City.

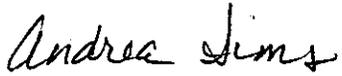
We know that you have options for using other recruitment firms. However, we believe that our approach sets us apart from our competitors in the following unique ways:

- Our web-based survey to determine the key attributes essential of the candidate completed by the organization's employees and community members. The results of the survey will provide the City Commission with important feedback from these key stakeholders for development of the profile for the ideal candidate;
- Management Style Assessment Analysis completed by the candidate that determines if the candidate's management style matches the needs of Deltona
- Video interviews that can be made available to the City Commission and the designees to augment the selection process; and
- Utilization of a proprietary online application system (exclusively licensed to Waters & Company, *A Springsted Company*) to facilitate talent management. The System has been designed by Waters & Company, *A Springsted Company* 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, particular experience, and credentials

City of Deltona, Florida  
November 25, 2014  
Page 2

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 216-695-4776 or by email at [asims@waters-company.com](mailto:asims@waters-company.com). Our Team would consider it a professional privilege to provide these services to the City of Deltona.

Respectfully submitted,



Andrea Sims, Vice President  
*Consultant*

sml

**The City of Deltona, Florida  
Proposal to Provide  
Executive Search Services**

## 1. Executive Summary

Waters & Company Executive Recruitment (WCER) recently merged with Springsted Incorporated, establishing one of the largest public sector executive search and organizational management firms in the United States. Our company combines the executive search expertise and resources of two highly respected firms, Waters & Company and Springsted Incorporated. WCER and Springsted are Women's Business Enterprise ("WBE") firms. Springsted, the parent corporation, is a certified WBE by the City of Saint Paul, Minnesota. Three employee-owners lead the firms and their 70-member staff. Our headquarters are located in Saint Paul, Minnesota, with offices strategically located throughout the United States. Specifically, our regional offices include Dallas, Texas; Milwaukee, Wisconsin; Des Moines, Iowa; Kansas City, Missouri; Richmond, Virginia; Denver, Colorado and Los Angeles, California.

WCER has a team of seven primary search consultants available to meet your executive search needs. Each consultant assigned to this recruitment has experience working with cities and the many different disciplines that comprise the City of Deltona, the leadership team and its constituencies. 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. Over the past five years, our combined consultant team has conducted over 1,000 executive recruitments.

The WCER project team will partner with the City Commission and others as your technical advisor to ensure that the recruitment process for your next City Manager, 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 WCER project team to draw upon Springsted's 50-plus years of service nationally and to Florida cities and to leverage WCER's ability to expand national recruitment for this position. The breadth and knowledge of the project team includes a variety of sizes and communities served, familiarity with potential candidates from Florida and beyond and the experience and understanding needed to evaluate each candidate's "fit" with the City's established qualifications.

### Physical Address

Waters & Company, *A Springsted Company*

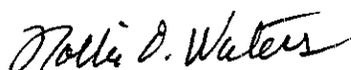
14285 Midway Road, Suite 340

Addison, Texas 75254

Office: 972-481-1950

Fax: 972-481-1951

Respectfully submitted,

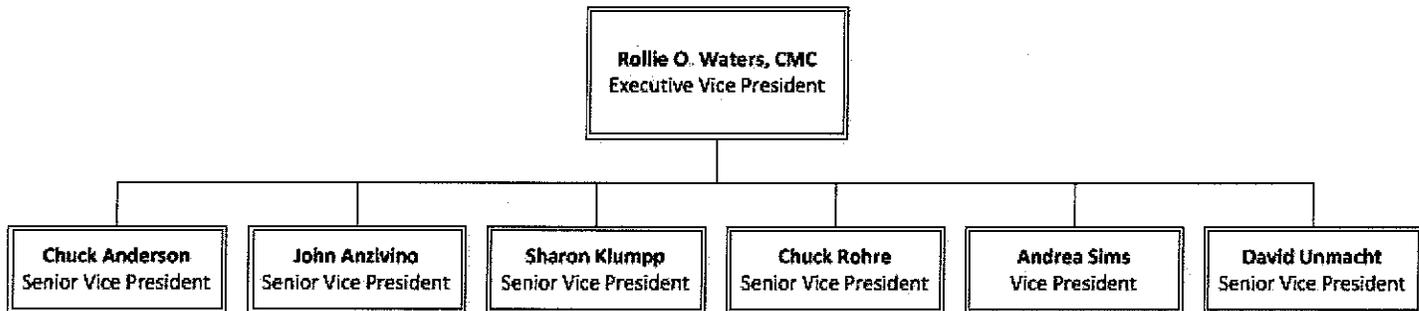


Rollie Waters, Executive Vice President  
*Consultant*

## 2. Prior Experience and Success Rate

### WATERS & COMPANY EXECUTIVE RECRUITMENT

A Springsted Company



**Mr. Rollie Waters, Executive Vice President**

Direct Phone: (214) 466-2424

Email: [rwaters@waters-company.com](mailto:rwaters@waters-company.com)

**Project Team Leader**

**Ms. Andrea Sims, Vice President**

Direct Phone: (216) 695-4776

Email: [asims@waters-company.com](mailto:asims@waters-company.com)

**Ms. Sharon Klumpp, Senior Vice President**

Direct Phone: (651) 223-3053

Email: [sklumpp@springsted.com](mailto:sklumpp@springsted.com)

**Mr. John Anzivino, Senior Vice President**

Direct Phone: (804) 726-9750

Email: [janzivino@springsted.com](mailto:janzivino@springsted.com)

**Mr. Chuck Anderson, Senior Vice President**

Direct Phone: (817) 965-3911

Email: [canderson@waters-company.com](mailto:canderson@waters-company.com)

**Mr. Chuck Rohre, Senior Vice President,**

Direct Phone: (214) 466-2436

Email: [crohre@waters-company.com](mailto:crohre@waters-company.com)

**Mr. David Unmacht, Senior Vice President**

Direct Phone: (651) 223-3047

Email: [dunmacht@springsted.com](mailto:dunmacht@springsted.com)

**Ms. Regan Brown, Project Coordinator**

Direct Phone: (214) 466-2445

Email: [rbrown@waters-company.com](mailto:rbrown@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, and 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.

**Andrea Sims***Vice President*

Andrea Battle Sims has been working in executive recruitment for over twelve years, managing all phases of the recruitment process for public sector executives, including: City and Assistant City Managers, Human Resources Directors, Police Chiefs, Chief Information Officers, Library Directors, City/County Attorneys, Parks & Recreation Directors, Finance Directors and Workforce Development Executive Directors. She has extensive experience in Florida including the Cities of Sanford, Eustis, Dunedin, as well as Broward County, Collier County, Escambia County and Pinellas County.

Andrea is an experienced professional with over twenty years of prior experience in Information Technology, IT Audit and Management experience in both the public and private sector. Her local government leadership roles include serving as the IT Director at Cleveland Public Schools with a staff of 50 and Deputy Director of IT at Cuyahoga County with a staff of 70. In addition, her county experience includes creating a start-up venture to sell public computer access to the legal community. Ms. Sims has held management positions at AT&T, Progressive Insurance, and National City Bank (now PNC), managing IT projects as well as IT professionals, along with serving as an internal consultant/auditor.

**Areas of Expertise**

- Executive Recruitment
- Recruitment and Retention Training
- Diversity-based Recruitment and Retention
- Information Technology Leadership
- Organizational Assessment
- Strategic Planning and Implementation
- Project Management
- Process Improvement
- Change Management

**Professional Accomplishments and Education**

Andrea's educational background includes a Bachelor of Arts in Mathematics from Spelman College, Atlanta, Georgia, and a Master of Science in Operations Research from The Wharton School at the University of Pennsylvania, Philadelphia, Pennsylvania. In addition, her post-graduate education includes numerous executive development seminars and certification from the Leadership Academy at Cleveland State University, the Anderson School at UCLA and the Gartner Group. Andrea's current and past civic involvement includes the Board of Trustees at the Gathering Place; American Cancer Society, Cuyahoga Unit; Junior League of Cleveland, along with leadership positions with the Links, Inc., the Spelman Alumnae Association, and Delta Sigma Theta, Inc.

**Sharon G. Klumpp***Senior Vice President and Consultant*


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Sharon Klumpp is a Senior Vice President and Consultant with Waters & Company, *A Springsted Company*. Ms. Klumpp has extensive experience specializing in organizational and departmental studies, human resource management, and executive search for public agencies. She also assists governing bodies and senior-level managers in the development, execution and evaluation of strategic plans.

Ms. Klumpp has extensive experience in serving government. She has served as Executive Director of the Metropolitan Council, a seven-county regional planning agency for the Minneapolis-Saint Paul metropolitan area, and as Associate Executive Director for the League of Minnesota Cities. Her experience also includes serving as City Administrator in Oakdale, Minnesota and as Assistant City Manager in both St. Louis Park, Minnesota and Saginaw, Michigan. Her private sector experience includes serving as the chief administrative officer for the Minneapolis office of a major global engineering and design firm.

Ms. Klumpp also served as an adjunct instructor at Walden University, where she taught public administration and organizational change in the University's School of Management. She served two terms on the Ramsey County Charter Commission and was chair for two years.

**Professional Accomplishments and Education*****Education***

University of Kansas, Lawrence, Kansas  
Masters of Public Administration

Miami University, Oxford, Ohio  
Bachelor of Arts in Political Science

***Affiliations***

International City/County Management Association  
International Public Management Association for  
Human Resources

## **John Anzivino**

### *Senior Vice President, Client Representative*

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Mr. Anzivino joined Springsted in December 2001 as Vice President and Client Representative. In July 2006, he was named Senior Vice President of the firm and, in December 2006, as Director of Springsted's Mid-Atlantic group. He assists Mid-Atlantic cities, counties, towns and non-profit organizations in addressing human resources, staffing, organizational management, financial, housing and economic development challenges in a variety of innovative ways. In addition, Mr. Anzivino oversees the bond issuance process for clients, ensuring that debt offerings are marketed and delivered in a timely and effective manner.

Mr. Anzivino has over 25 years of experience in state and local government. He served as Town Manager for Warrenton, Virginia for more than 12 years. Prior to Warrenton, he served as County Administrator for four years in Caroline County, Virginia, and for six years in Amelia County, Virginia. Each of these communities received state and national recognition for developing creative and innovative approaches to resolving complex financial and programmatic issues that they faced during his tenure. During this time, Mr. Anzivino authored chapters in the *VML Handbook for Mayors and Council Members* and the *Virginia Association of Counties Handbook for County Supervisors*. He has also held positions in West Virginia with the Governor's Office of Economic and Community Development, specializing in resolving complex utility and project financing issues and with a regional planning and development agency, as its Assistant Director.

Mr. Anzivino has been an active participant in professional associations, having served as Vice President of the Virginia Local Government Management Association and as President of the Virginia Association of County Administrators. He has addressed several national and regional organizations on changes in the workforce and their relationship to hiring patterns in the public sector.

### **Professional Accomplishments and Education**

#### *Education*

University of Georgia, Athens, Georgia  
Master of Public Administration

Concord College, Athens, West Virginia  
Bachelor of Arts

University of Virginia, Charlottesville, Virginia  
Senior Executive Institute

#### *Affiliations*

International City Management Association  
(ICMA)

Virginia Local Government Management  
Association (VLGMA)

International Public Management Association for  
Human Resources (IPMA)

Virginia Local Government Management  
Association (VLGMA), Life Member

North Carolina Government Finance Officers  
Association (NCGFOA)

## **Charles (Chuck) Anderson**

### *Senior Vice President*

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Charles (Chuck) S. Anderson is a Senior Vice President for 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

**Chuck Rohre**  
*Senior Vice President*

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Chuck Rohre a Senior Vice President for Waters & Company, a *Springsted Company*. In this role, he is responsible for managing and conducting executive recruitment engagements for the firm to insure their integrity, timeliness and adherence to budget parameters. Chuck has more than 35 years of experience in managing and consulting in both the private and public sectors. He has served as Police Chief and Director of Public Safety for North Texas municipalities with populations ranging from 9,000 to 200,000 plus. Prior to beginning his consulting career, Mr. Rohre served for three years as Police Chief of Plano, Texas.

Chuck joined the firm in January 2006 following a 13-year engagement with another nationally recognized public sector search firm where he managed the Texas and Southwestern operations. He has an extensive and successful track record of completed recruitment across the nation, especially in the Midwestern and Southwestern states. Among others, he has led recruitment processes for City and Assistant City Managers, Police Chiefs, Fire Chiefs, Library Directors, Chief Information Officers, City/County Attorneys, Parks & Recreation Directors, Finance Directors and Public Works Directors. The clients range from as small as 2,500 to as large as 700,000 in population. He has also conducted management consulting assignments in a number of areas including public safety, career development and strategic planning. He has written and presented training in a variety of subject areas including personnel assessment, leadership and management skills, and career development for public sector employees.

**Areas of Expertise**

- Executive Recruitment
- Background Investigations
- Assessment Centers
- Career Development
- Strategic Planning
- Organizational Assessment

**Professional Accomplishments and Education**

Chuck received his bachelor's degree in Career Development from the Dallas campus of Abilene Christian University and his Master's degree in Human Relations and Management from the same institution. He has completed advanced management training at the Institute for Law Enforcement Administration and now serves on its adjunct faculty and advisory board. Chuck completed the Federal Bureau of Investigation's prestigious LEEDS course at Quantico, Virginia. He is a veteran of the United States Army, serving in the United States and the Republic of Viet Nam.

**David Unmacht***Senior Vice President*

Mr. Unmacht is a Consultant for the Waters & Company, a *Springsted Company*. He works closely with local governments in many different fields including budget and resource planning, organizational and leadership development, staff/elected official relations, intergovernmental collaborations, communication strategies, facilitation services and strategic planning.

Mr. Unmacht has over 30 years of local government experience having served both cities and counties and now in private practice. Prior to joining Springsted, Mr. Unmacht served for 11 years as Administrator for Scott County, Minnesota. Prior to that, he was Deputy County Administrator in Dakota County, City Manager in Prior Lake and City Administrator in Belle Plaine, Minnesota. While with Scott County, Mr. Unmacht oversaw a budget that surpassed \$100 million, a workforce of approximately 700 and a population of 125,000. During his tenure, the County was awarded the Association of Minnesota Counties Achievement Award five times for a program, person or service.

His main focus has been creating and maintaining strong organizational cultures and establishing excellent labor/management relations. By emphasizing a leadership-focused training and development foundation, Mr. Unmacht has successfully guided the communities he's worked with in a progressive and positive manner.

Mr. Unmacht is a frequent writer, speaker and panelist for conferences and training groups. He has been recognized with the Excellence in County Government Award by the Minnesota Association of County Administrators (2000) and the Manager of the Year Award by the Minnesota City/County Management Association (2006). Mr. Unmacht has also served as President of the Minnesota City/County Management Association.

**Professional Accomplishments and Education***Education*

Drake University, Des Moines, Iowa  
Master of Public Administration

Wartburg College, Waverly, Iowa  
Bachelors in Business Administration  
and Political Science

*Affiliations*

International City Management Association  
Minnesota City/County Management  
Association  
Credentialed Manager, ICMA Management  
Certification  
Participant, Senior Executive Institute,  
University of Virginia

**Regan Brown***Project Coordinator*

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Regan Brown is the Project Coordinator at Waters & Company Executive Recruitment, 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, Regan coordinates communications with candidates, the handling of resumes and the distribution of 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 verifications and notifying the finalists. Her responsibilities extend to editing presentations and proposals, advertisement placements and general office administration

***Professional Accomplishments and Education***

Previously, Regan worked in Residential Real Estate and as the Operations Manager for a publically held subprime financial services company. Coordinating between board members, executive staff and operations employees, she implemented executive initiatives at all levels of the company. Regan also served as ISO 9001 Management Representative for Halo Financial Services, LLC.; her attention to detail and her passion for efficiency allowed for a perfect audit record three years in a row. Her service leadership attitude ensures an exceptional customer service experience

### 3. Past Performance

#### References

##### City of Sanford, Florida

Mr. Fred Fosson, *Human Resources Director*  
rdspirito@dunedinfl.net  
727-298-3007

**Project:** Selection of City Manager and Police Chief

##### City of Charlotte, North Carolina

Ms. Cheryl Brown, *Director of Human Resources*  
clbrown@ci.charlotte.nc.us  
704-336-5703

**Project:** Selection of City Manager

##### Escambia County, Florida

Mr. Tom Turner, *Human Resources Director*  
TGTurner@myescambiacounty.fl.us  
850-595-1637

**Project:** County Administrator

##### City of Fort Worth, Texas

Former Mayor Moncrief  
mike@moncriefinvestments.com  
817-338-1225

**Project:** Selection of City Manager and Assistant City Manager

##### City of Dunedin, Florida

Mr. Rob DiSpirito, *City Manager*  
rdspirito@dunedinfl.net  
727-298-3007

**Project:** Selection of HR Director, Finance Director and Public Works Director

#### Relevant Recruitments

The following is a list of relevant recruitments conducted by WCER:

##### List of All Firm Executive Recruitments 2012 – Present

Year	Client	State	Type of Search	Entity Type	Population
2012	City of Albertville	MN	City Administrator	City	7,044
2012	City of Brainerd	MN	City Administrator	City	13,517
2012	City of Charlotte	NC	City Manager	City	792,862
2012	City of Eau Claire	WI	City Manager	City	61,704
2012	City of Fairview	TX	Town Manager	City	8,148
2012	City of Martinsville	VA	City Manager	City	15,416
2012	City of Rockville	MD	City Manager	City	47,388
2012	City of Scandia	MN	City Administrator	City	3,936
2012	City of Sun Prairie	WI	City Administrator	City	29,364
2012	City of Thief River Falls	MN	City Administrator	City	8,661
2012	City of Winchester	VA	City Manager	City	26,587
2012	City of Windsor Heights	IA	City Administrator	City	4,860
2012	Town of Exmore	VA	Town Manager	Town	1,458
2012	Town of Morehead City	NC	City Manager	City	7,691
2012	Town of Ocean City	MD	City Manager	Town	7,102
2013	City of Alexandria	MN	City Administrator	City	11,549
2013	City of Bayport	MN	City Administrator	City	3,496
2013	City of Belle Plaine	MN	City Administrator	City	6,804
2013	City of Burnsville	MN	City Manager	City	60,828
2013	City of Clinton	NC	City Manager	City	8,676
2013	City of East Grand Forks	MN	City Administrator	City	8,548
2013	City of International Falls	MN	City Administrator	City	6,357

<b>List of All Firm Executive Recruitments 2012 – Present</b>					
<b>Year</b>	<b>Client</b>	<b>State</b>	<b>Type of Search</b>	<b>Entity Type</b>	<b>Population</b>
2013	City of Irving	TX	City Manager	City	228,653
2013	City of Justin	TX	City Manager	City	3,333
2013	City of Litchfield	MN	City Administrator	City	6,671
2013	City of Montgomery	MN	City Administrator	City	2,933
2013	City of Moose Lake	MN	City Administrator	City	2,753
2013	City of Muskegon	MI	City Manager	City	37,213
2013	City of Newport News	VA	City Manager	City	179,611
2013	City of Norwood Young America	MN	City Administrator	City	3,583
2013	City of Raleigh	NC	City Manager	City	423,179
2013	City of Roseville	MN	City Manager	City	34,666
2013	City of Sherburne	MN	City Administrator	City	1,128
2013	City of Watertown	MN	City Administrator	City	4,239
2013	City of West Saint Paul	MN	City Manager	City	19,708
2013	Village of Bellevue	WI	Village Administrator	Village	14,570
2014	City of Belle Plaine	MN	City Administrator	City	6,804
2014	City of Eustis	FL	City Manager	City	19,214
2014	City of Irving	TX	City Manager	City	228,653
2014	City of Lexington	VA	City Manager	City	6,998
2014	City of Midlothian	TX	City Manager	City	19,891
2014	City of Novi	MI	City Manager	City	57,960
2014	City of Springfield	MN	City Manager	City	2,114
2014	City of Westminster	CO	City Manager	City	110,945
2014	Town of Boone	NC	Town Manager	Town	17,774
2014	Town of Cape Charles	VA	Town Manager	Town	990
2014	Township of Lower Merion	PA	Township Manager	Township	59,850

## 4. Cost

The all-inclusive professional fee to conduct the recruitment is provided below and includes the cost of professional services by the Project Team Leader and the project support staff, and all project-related expenses such as advertising, printing, candidate background and reference 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 WCER and are handled directly by the client organization. If there is a preference for separate billings for the professional services and project-related expenses, please advise us and the agreement can reflect such an arrangement.

The all-inclusive professional fee will be billed in three installments: 40% of the fee will be billed at the beginning of the recruitment; 40% at the implementation of Phase III; and 20% upon acceptance of offer by the candidate. We are open to negotiate an alternative payment schedule if selected for this search.

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 above mentioned 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 Andrea Sims, Vice President at [asims@waters-company.com](mailto:asims@waters-company.com) or via phone at 216-695-4776.

PHASE	DESCRIPTION OF PROFESSIONAL SERVICES	FEES
Phase I	Task 1 – Candidate Profile Development/Advertising/Marketing (includes one day on site by Project Team Leader) Task 2 – Identify Quality Candidates	
Phase II	Task 3 – Screening of Applications and Submission of Recommended Finalists to Client 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	
<b>TOTAL ALL-INCLUSIVE PROFESSIONAL FEE</b>		<b>\$24,500</b>

OPTIONAL SERVICES FOR CONSIDERATION	FEES
Additional work related to the search process and as specifically requested by the City that is outside of the scope of this project (i.e. additional onsite meetings) is additional. The fixed professional fee for this recruitment anticipates no more than three onsite consulting days with one consultant. However, we would be pleased to provide additional onsite consulting visits for our standard daily rate of \$1,500 plus expenses.	<b>\$1,500</b> per day plus expenses

### Professional Liability Insurance

The RFP requests that all Certificates of Insurance shall provide that the insurance company gives the City thirty (30) days prior written notice of cancellation, non-renewal and/or any material change in policy. Our Certificate of Liability Insurance says that notices of cancellation will be delivered in accordance with the policy provisions. Our policies provisions are that Springsted, as the first named insured, would be notified. Springsted has previously provided a written commitment as first named insured to give notice of cancellation to a client requesting such notice.

## 5. Understanding of Project and Project Requirements

WCER understands the mission and goals of the project: to conduct a thorough and professional recruitment process to find the best City Manager candidates that will make the City successful, offering the City's citizens and businesses the best quality of life.

The detailed project schedule is shown under the project milestones

As stated on page 1, WCER is a Certified Women's Business Enterprise by the City of St. Paul, Minnesota

### **Triple Guarantee**

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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, WCER 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. 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) WCER will not directly solicit any candidates selected under this contract for any other position while the candidate is employed with your organization.

## 6. Approach and Method

At each milestone in the project, the City Commission will have the opportunity to provide input and / or approve the steps taken by WCER. This includes input into the recruitment strategy as well as providing input/approval of the candidates as they move forward in the process.

### **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 qualifications, professional experience, personal characteristics and other factors related to the success of the candidate in the position of your City Manager.

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 Project Team Leader will come on site to meet with the City Commission and others as requested, to discuss the required background, experiences and management and leadership characteristics for your City Manager position. We will also request organizational charts, budgetary information, operational reports and other documentation describing the current issues and responsibilities of the position. We meet individually (or collectively depending upon your preference) with the City to broaden our understanding of the position's leadership and management requirements, current issues, strategic priorities and to identify expectations for the City Manager. We also obtain input from department leaders to increase our understanding of the City's strengths and needs [See example of a recruitment brochure in Appendix I.]

Information obtained from these meetings, coupled with our review of the job description and other City documents, is used to prepare a position profile. The completed profile and job announcement will be approved by the City Commission and the City's leadership team before recruitment begins. The position profile will be central to our recruitment as well as candidate outreach.

The Project Team will also work with the City of Deltona 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. Additionally, WCER 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.

Project Milestone	Deliverables	Proposed Date
Position review and analysis	<ul style="list-style-type: none"> <li>Onsite interview with the City.</li> <li>WCER will receive information regarding the City's budgets, organizational charts, images, logos, etc</li> <li>Develop draft documents (Recruitment Brochure, Advertisement, Advertising Table and Timeline).</li> </ul>	December 4 – 5, 2014
Approve brochure and marketing letter	<ul style="list-style-type: none"> <li>Brochure sent to the City for final approval.</li> <li>Marketing letter developed and distributed.</li> </ul>	December 12, 2014

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

Utilizing the information developed in Task I, WCER will identify and reach out to individuals who will be outstanding candidates for the position of City Manager. 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 throughout the years.

In consultation with the City, we will develop a customized recruitment strategy for the City Manager position to include placing job ads with professional local government associations. We anticipate job postings to be placed in the International City/County Management Association (ICMA) and other national recruitment sites. To increase the exposure of this position, we will strategically place the job postings with the Florida League of Cities and other Florida city/county management associations and public administration schools that are in regular contact with alumni regarding job opportunities. We will discuss and determine the overall strategy (state, region, national) with you during our first meetings.

Our recruitment outreach emphasizes personal contacts with prospective candidates. We also contact ICMA-credentialed managers and managers who demonstrate an ongoing commitment to professional leadership development. Finally, we draw upon our knowledge of qualified local government managers from our database and from the professional network of our team.

These efforts will be supplemented by the creation of an appropriate database utilizing our extensive, interactive applicant database for the City of Deltona's City Manager position. This will provide the WCER team with the ability to customize applicant flow and tracking, communication with applicants and the ability to conduct database inquiries for candidates based on characteristics important to the City such as geographic location, particular experience and credentials. We encourage candidates to maintain updated information within our database for consideration in future recruitment engagements. WCER's commitment to customer service extends to the candidate as well as the client.

During this part of the process the Project Team will work with the City Commission and others as designated to reach consensus on the interpersonal profile. Our research will determine the key competencies, work values and management styles of the position and match the candidates to each attribute. Each candidate submitting a resume is sent a timely acknowledgement by our Team, giving an approximate schedule for the recruitment. Further 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.

<b>Project Milestone</b>	<b>Deliverables</b>	<b>Proposed Date</b>
Recruitment and candidate outreach	<ul style="list-style-type: none"> <li>• Online data collection and profile development</li> <li>• Development of the interactive searchable applicant database for recruitment of the City Manager</li> <li>• Candidates requiring hard copy mailings are identified and hard copies are mailed.</li> <li>• WCER performs direct outreach to prospective candidates identified in the recruitment strategy</li> <li>• Utilizing the extensive applicant database to identify applications and review applicant pool for competencies/demographics.</li> </ul>	December 4, 2014 – January 16, 2015

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

Our recruiting efforts in Task II are directed towards the quality of the candidates we contact, not the quantity. The minimum qualifications for the candidate will include the requisite experience and skills needed to successfully perform the position's duties. In Task III the Project Team, under the direction of the Project Team Leader, will screen the candidates against the criteria within the candidate profile and develop a list of semi-finalists for recommendation to the City Commission.

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 submitted 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 personality, abilities, and cultural fit.

Our team will provide a link to representatives of the City who have input into the hiring decision, allowing them to review and rate the recorded responses. This provides the organization with additional candidate assessments that can be customized to fit the unique needs of your City.

Throughout the process, you will have access to our Master Applicant List (MAL); a list of all prospective candidates who applied for the position, which will provide pertinent data about each applicant.

<b>Project Milestone</b>	<b>Deliverables</b>	<b>Proposed Date</b>
Applicant screening and recommendation of Semi-finalists	<ul style="list-style-type: none"> <li>• WCER compares applications to the recruitment template developed in our searchable applicant database</li> <li>• Top 10-15 semi-finalists are identified</li> <li>• WCER develops customized candidate questionnaire &amp; due diligence questionnaire to provide to semi-finalists.</li> <li>• Semi-finalist books are developed including the following: brochure, master applicant list, cover letter, resume, and candidate questionnaire of candidates to be considered</li> <li>• WCER and the City review and rate video interviews</li> <li>• WCER sends links to City to review the aggregate responses and ratings</li> <li>• Semi-finalists complete candidate management style assessment and responses are reviewed and interview questions are developed.</li> </ul>	January 19 – 30, 2015

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

When the City approves of a group of finalists for on-site interviews, WCER will begin the process of conducting reference checks, background checks and academic verifications. Contact is then made with direct and indirect references to verify the accomplishments and work experiences of the candidates. The purpose of the reference interviews is to allow WCER to complete our understanding of the work experience, professional performance and work characteristics of the finalists.

WCER uses S2Verify as a vendor to complete background checks and verify degrees and certifications.

For the background checks, WCER 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 do require a minimum of ten business days between the time that you select the finalists for on-site interviews and when we send you candidate documentation for your final interview process.**

<b>Project Milestone</b>	<b>Deliverables</b>	<b>Proposed Date</b>
Finalist complete questions	<ul style="list-style-type: none"> <li>• Finalists complete their professional accomplishments, critical problem analysis &amp; reference list</li> </ul>	February 6, 2015
Interview design	<ul style="list-style-type: none"> <li>• WCER confirms interviews with candidates</li> <li>• Travel logistics are scheduled for the candidates</li> </ul>	February 9, 2015
Comprehensive background check completed for finalist candidates	<ul style="list-style-type: none"> <li>• WCER completes background investigations of finalist candidates</li> </ul>	February 2 – 13, 2015

#### **Task V: Final Interview Process**

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

The Project Team Leader will be available during the final interview process to answer questions and, if requested, assist with the final evaluation and selection of the successful candidate. 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 if applicable.

Project Milestone	Deliverables	Proposed Date
Finalist books are presented	<ul style="list-style-type: none"> <li>• Finalist books are developed including brochure, interview schedule, cover letter, resume, candidate questionnaire, candidate descriptive profile, accomplishments, suggested interview questions, candidate assessment form, and management style probing questions</li> </ul>	February 16, 2015
On-site Interviews with Finalists	<ul style="list-style-type: none"> <li>• Interviews are scheduled</li> <li>• Consultant attends client interviews and is available to facilitate discussions of candidates.</li> </ul>	Week of February 16
Offer made / accepted	<ul style="list-style-type: none"> <li>• If requested, WCER participates in candidate employment agreement negotiations</li> <li>• WCER notifies candidates of decision</li> <li>• WCER confirms final process close out with the City of Deltona.</li> </ul>	Week of February 23

### **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. On a regular basis, we participate in their membership events.

To that end, we take responsibility for diversity in our organization, our recruitment strategy, and our candidate pools. In this search, 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 Deltona's City Manager 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.

## 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.

<b>CITY OF DELTONA, FLORIDA EXECUTIVE RECRUITMENT PRELIMINARY TIMELINE</b>		
The following Timeline represents a preliminary schedule for your executive recruitment based on a commencement date of December 1, 2014. Actual target dates will be developed in consultation with and approved by the City of Deltona.		
Project Milestone	Deliverables	Proposed Date
Profile Development, Recruitment and Candidate Outreach	<ul style="list-style-type: none"> <li>WCER completes on-site interviews to develop candidate profile and recruitment brochure; the City approves ad placement schedule and timeline</li> <li>WCER sends draft recruitment brochure to the City</li> <li>The City returns draft recruitment brochure (with edits) to WCER.</li> <li>WCER commences executive recruitment advertising and marketing</li> <li>Online data collection and profile development</li> </ul>	December 1 – 12, 2014
Applicant Screening and Recommendation of Semi-Finalist	<ul style="list-style-type: none"> <li>WCER 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</li> <li>WCER completes formal review of applications and sends selected resumes and questionnaire responses to the City for review. Also candidates' recorded interviews are presented</li> <li>Semi-finalist completes candidate management style assessment and responses are reviewed and interview questions are developed</li> <li>WCER meets with the City and recommends semi-finalists; the City selects finalists for on-site interviews</li> </ul>	December 15, 2014 – January 16, 2015
Comprehensive background check completed on finalists	<ul style="list-style-type: none"> <li>WCER completes reference checks/background checks/ academic verification on finalists</li> </ul>	January 19 – 30, 2015
On-site Interviews with Finalists	<ul style="list-style-type: none"> <li>WCER sends documentation for finalists to the City.</li> <li>The City conducts on-site interviews with finalists</li> </ul>	Week of February 2, 2015
Offer made / accepted	<ul style="list-style-type: none"> <li>The City extends employment offer to selected candidate.</li> </ul>	Week of February 9, 2015

## 7. References

### **City of Sanford, Florida (Population: 56,002)**

Mr. Fred Fosson, Human Resources Director  
 300 N. Park Avenue  
 Sanford, FL 32771  
 407-688-5025  
 fred.fosson@sanfordfl.gov

### **Town of Boone, North Carolina (Population: 17,774)**

Ms. Peri Moretz, Human Resources Director  
 567 West King Street  
 Boone, NC 28607  
 Peri.Moretz@townofboone.net

### **City of Charlotte, North Carolina (Population: 792,862)**

Ms. Cheryl Brown, Director of Human Resources  
 600 East 4th Street  
 Charlotte, NC 28202  
 704-336-5703  
 clbrown@ci.charlotte.nc.us

### **City of Irving, Texas (Population: 228,653)**

Mr. Ike Obe, Human Resources Director  
 825 West Irving Boulevard  
 Irving, TX 75060  
 972-721-2665  
 iobi@cityofirving.org

### **City of Muskegon, Michigan (Population: 37,213)**

Mr. Byron Mazade, City Manager  
 933 Terrace Street  
 Muskegon, MI 49440  
 231-724-6724  
 bryon.mazade@shorelinecity.com

### **City of Novi, Michigan (Population: 57,960)**

Ms. Tia Gronlund-Fox, Director of Human Resources  
 45175 Ten Mile Road  
 Novi, MI 48375  
 248-347-3272  
 tgronlundfox@cityofnovi.org

**RFP 15004 Executive Search Firm  
REFERENCES – include in Tab 7**

<b>#1</b>	<b>Agency</b>	City of Sanford, Florida	
	<b>Address</b>	300 N. Park Avenue	
	<b>City, State, ZIP</b>	Sanford, FL 32771	
	<b>Contact Person</b>	Mr. Fred Fosson, Human Resources Director	
	<b>Telephone</b>	407-688-5025	<b>Email:</b> FRED.FOSSON@Sanfordfl.gov
	<b>Date(s) of Service</b>	2006, 2007, 2010, 2012	
	<b>Type of Service</b>	Selection of City Manager (2010), Chief of Police (2012 & 2010), Human Resources Director (2007) and Director of Finance (2006)	
	<b>Comments:</b>		
<b>#2</b>	<b>Agency</b>	Escambia County, Florida	
	<b>Address</b>	221 Palafox Place, Suite 200	
	<b>City, State, ZIP</b>	Pensacola, FL 32502	
	<b>Contact Person</b>	Mr. Tom Turner, Human Resources Director	
	<b>Telephone</b>	850-595-1637	TGTurner@myescambiacounty.fl.us
	<b>Date(s) of Service</b>	2013	
	<b>Type of Service</b>	Selection of a County Manager	
	<b>Comments:</b>		
<b>#3</b>	<b>Agency</b>	City of Dunedin, Florida	
	<b>Address</b>	750 Milwaukee Avenue	
	<b>City, State, ZIP</b>	Dunedin, FL 34698	
	<b>Contact Person</b>	Mr. Rob DiSpirito, City Manager	
	<b>Telephone</b>	727-298-3007	rdispirito@dunedinfl.net
	<b>Date(s) of Service</b>	2008, 2009, 2011, 2012, 2013	
	<b>Type of Service</b>	Selection of HR Director, Finance Director and Public Works Director, Director of Planning and Dev. Svcs., City Clerk, City Manager	
	<b>Comments:</b>		

## REFERENCES-CONTINUED

<b>#4</b>	<b>Agency</b>	City of Charlotte, North Carolina	
	<b>Address</b>	600 East 4th Street	
	<b>City, State, ZIP</b>	Charlotte, NC 28202	
	<b>Contact Person</b>	Ms. Cheryl Brown, Director of Human Resources	
	<b>Telephone</b>	704-336-5703	clbrown@ci.charlotte.nc.us
	<b>Date(s) of Service</b>	2012, 2010, 2008	
	<b>Type of Service</b>	City Manager, Director of Utilities, Police Chief	
	<b>Comments:</b>		
<b>#5</b>	<b>Agency</b>	City of Fort Worth, Texas	
	<b>Address</b>	1000 Throckmorton St.	
	<b>City, State, ZIP</b>	Fort Worth, TX 76102	
	<b>Contact Person</b>	Former Mayor Moncrief	
	<b>Telephone</b>	817-338-1225	mike@moncriefinvestments.com
	<b>Date(s) of Service</b>	2010, 2008, 2007	
	<b>Type of Service</b>	City Attorney, Assistant City Manager, City Manager	
	<b>Comments:</b>		

**RFP 15004 Executive Search Firm  
REFERENCES – include in Tab 7**

#1	Agency	City of Sanford, Florida	
	Address	300 N. Park Avenue	
	City, State, ZIP	Sanford, FL 32771	
	Contact Person	Mr. Fred Fosson, Human Resources Director	
	Telephone	407-688-5025	Email: FRED.FOSSON@Sanfordfl.gov
	Date(s) of Service	2006, 2007, 2010, 2012	
	Type of Service	Selection of City Manager (2010), Chief of Police (2012 & 2010), Human Resources Director (2007) and Director of Finance (2006)	
	Comments:		
#2	Agency	Escambia County, Florida	
	Address	221 Palafox Place, Suite 200	
	City, State, ZIP	Pensacola, FL 32502	
	Contact Person	Mr. Tom Turner, Human Resources Director	
	Telephone	850-595-1637	TGTurner@myescambiacounty.fl.us
	Date(s) of Service	2013	
	Type of Service	Selection of a County Manager	
	Comments:		
#3	Agency	City of Dunedin, Florida	
	Address	750 Milwaukee Avenue	
	City, State, ZIP	Dunedin, FL 34698	
	Contact Person	Mr. Rob DiSpirito, City Manager	
	Telephone	727-298-3007	rdispirito@dunedinfl.net
	Date(s) of Service	2008, 2009, 2011, 2012, 2013	
	Type of Service	Selection of HR Director, Finance Director and Public Works Director, Director of Planning and Dev. Svcs., City Clerk, City Manager	
	Comments:		



## 8. City Forms

The signed forms are included in the following pages.

## CITY OF DELTONA VENDOR INFORMATION SHEET

The information below is required to complete your proposal packet. Type or print only.

Company Name: Waters & Company, A Springsted Company

Address 1: 14285 Midway Road

Address 2: Suite 340

City: Addison

State: Texas

Zip Code: 75254

Phone Number: 972-481-1950

Fax Number: 972-481-1951

Project Contact: Andrea Sims, Vice President

e-mail address: asims@waters-company.com

### Remittance (Payment) Mailing Information

Address 1: 380 Jackson Street

Address 2: Suite 300

City: Saint Paul State: Minnesota

Zip Code: 55101

Phone Number: 651-223-3000

Fax Number: 651-223-3014

Project Contact: Larry Tuthill

e-mail address: ltuthill@springsted.com

Federal Tax ID No.:  
47-1064404

Tax ID Type:  Federal Tax ID  Social Security Number

**NON-COLLUSION AFFIDAVIT**

I, Bonnie C. Matson, depose and say that:

1. I am Principal of the firm of Waters & Company, the firm submitting the response described in this Request for Proposals for:

RFP 15004 Executive Search Firm and that I executed the said response with full authority to do so:

2. the prices in this bid have been arrived at independently without collusion, consultation, communication or agreement for the purpose of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor;

3. unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to bid opening, directly or indirectly, to any other bidder or to any competitor; and

4. no attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit, or not to submit, a bid for the purpose of restricting competition;

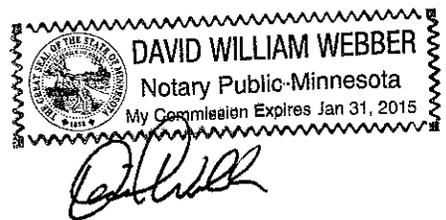
5. the statements contained in this affidavit are true and correct, and made with full knowledge that the City of Deltona relies upon the truth of the statements contained in this affidavit in awarding contracts for said project.

Signature of Bidder: *Bonnie C. Matson* Date: November 21, 2014  
STATE OF: MINNESOTA CITY OF: SAINT PAUL

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, (name of individual signing) affixed his/her signature in the space provided above on this 21<sup>st</sup> November day of 2014

**NOTARY PUBLIC**

My Commission Expires: January 31, 2015



**DRUG-FREE WORKPLACE FORM**

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that:

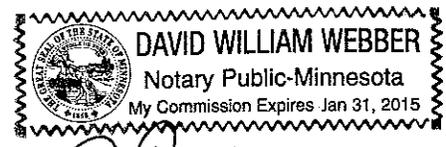
Waters & Company  
(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 (Florida Statutes) or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, or any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

*David M. Webber*  
**Proposer's Signature**  
November 21, 2014  
**Date**

**NOTARY PUBLIC**  
My Commission Expires:  
*January 31, 2015*



*David M. Webber*  
*November 21, 2014*

**LOBBYING AND CONFLICT OF INTEREST CLAUSE  
ETHICS CLAUSE**

“ “

(Company)

“ Waters & Company warrants that he/it has not employed, retained or otherwise had act on his/its behalf any former City officer or employee or any City officer or employee. For breach or violation of this provision the City may, in its discretion, terminate this contract without liability and may also, in its discretion, deduct from the contract or purchase price, or otherwise recover, the full amount of any fee, commission, percentage, gift, or consideration paid to the former City officer or employee”

Signature *[Handwritten Signature]*

Date: November 21, 2014

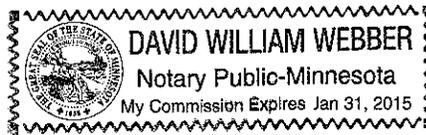
STATE OF: MINNESOTA CITY OF: SAINT PAUL

Subscribed and sworn to (or affirmed) before me on (date) by (name of affiant). He/She is personally known to me or has produced as identification. (type of identification)

**NOTARY PUBLIC**

My commission expires:

*January 31, 2015*



*[Handwritten Signature]*

*November 21, 2014*

Submission of Proposals

# **APPENDIX I**

## **Sample Brochure**



# CITY MANAGER

**THE CITY OF EUSTIS, FLORIDA SEEKS A PROVEN, INNOVATIVE MUNICIPAL LEADER AND PROFESSIONAL WITH HIGH ETHICAL STANDARDS TO SERVE AS ITS NEXT...**

## CANDIDATE PROFILE

The City Manager will be a proven leader, and accustomed to leading groups to work towards a common vision. The successful Candidate must provide focused leadership, promoting an outcome-oriented environment. He/she must be able to show consideration and respect to existing staff and encourage them to offer ideas that will improve the organization. The next City Manager must be able to be politically neutral even on highly political issues. He/she must have the ability to have frank talks with constituencies while being respectful and non-confrontational, without alienating others or displaying defensiveness. The City Manager is expected to have a genuine interest in being a part of the Eustis community as well as becoming well-connected within the community of Florida public sector managers.

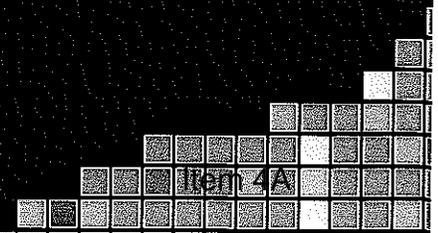
## THE COMMUNITY

The City of Eustis is located in Lake County, Florida, about 25 miles northwest of Orlando, Florida. The City was incorporated in 1883 and adopted its present charter in 1992. With a population of 18,500+, Eustis is ideally located on beautiful Lake Eustis within easy driving distance of Orlando, as well as the Atlantic and Gulf Coast beaches, the Ocala National Forest and the Florida Space Coast. The City has a diverse economy with businesses and industries in agricultural technology, food products, graphics, forest products, manufacturing and regional transportation. It is a welcoming atmosphere for entrepreneurship, small business, light manufacturing, and sustainable technology. A few of the nearby major industries located in or near Eustis include Florida Food Products, Mercer Products, Inc., Service Trucking, U.S. Nutraceuticals, Lake Mechanical Contractors and AgriStarts.

Eustis has great attractions for visitors and residents alike including extensive outdoor activities at beaches, the lakefront and at well-regarded golf courses. The Downtown Waterfront Entertainment District offers unique shopping, dining and live entertainment venues. The First Friday Street Party provides a family-friendly community social event

promoting downtown businesses and showcases the Historic Downtown. Other highlights include the Lake Eustis Museum of Art, Eustis Historical Museum (Clifford House) and the performing artistry of the Bay Street Players at the Historic State Theatre. The City's George Washington Birthday Festival and Parade, also known as GeorgeFest, is the nation's second oldest commemoration of the Nation's first President. It is also the longest running festival of any kind in the State of Florida.

A variety of excellent public and private schools and a City public library, which celebrated its Centennial anniversary, are indicative of the value placed on education. Nearby, Lake-Sumter State College, Lake Technical College, and the University of Central Florida, Rollins College, Stetson University, St. Leo College, Nova Southeastern University, and Embry-Riddle Aeronautical University provide paths for continued education.





## GOVERNANCE

The City utilizes a Commissioner/Manager form of government. Five (5) Commission members are elected to staggered four (4)-year terms. Each year, the Commission chooses a new Mayor from the existing group of Commissioners. The current estimated population is over 18,850 with the expectation that there will be growth to about 22,000 by 2020. The City of Eustis' Goals as part of the 2013-2014 Strategic Plan are:

- To be a beautiful, livable City with a vibrant lakefront identity
- To expand the local economy
- To provide quality, cost-effective public services in accordance with the Vision and Mission created in conjunction with this plan.

## VISION

Eustis is a vibrant lakefront community with a well-integrated local economy strengthened by creativity and innovation. It is a community that respects and honors its history and its rich natural environment. It provides residents, workers, and visitors a friendly, welcoming sense of place.

## MISSION

Create a superior quality of life by engaging and partnering with a community to provide financially prudent and customer-friendly services.

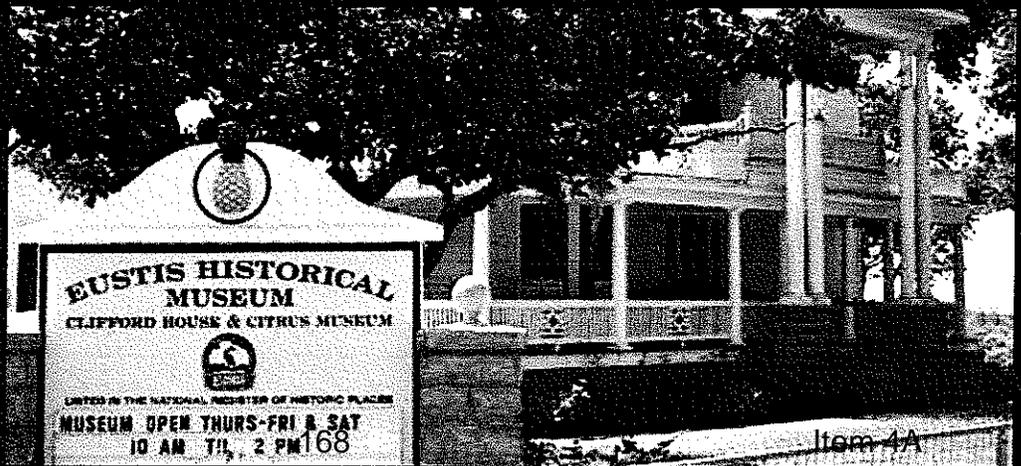
## POSITION AND ORGANIZATIONAL PROFILE

The City Manager is a full-time position appointed by the Commission, serving as the City's Chief Executive/Administrative Officer. The City Manager appoints all administrative officers, however, appointment of both the Finance Director and the City Clerk require approval by the City Commission. The City's Charter authorizes Departments for Finance, Police, Fire, Water, Sewer, and Public Works; the City Manager may establish other Departments by ordinance upon approval by the City Commission.

The City provides a full range of services including Public Safety (Building, Fire and Police), Finance (Financial Services, Payroll, Purchasing, Utility Billing and Information Technology), Public Works (Engineering, Streets, Stormwater, Garage, Cemetery and Building Maintenance), Human Resources, Library, Parks and Recreation, Development Services (Planning, Building and Code Enforcement), and other General

Government Services. The City employs a staff of 215 full-time, 47 part-time with an Operating Budget of \$13.9 million and a Capital Improvement Budget of \$4.8 million. The tax base of the City is primarily residential in nature, with the direction shifting from an agricultural community to one that is substantially residential, with moderate growth in a clean industrial base. The City recently hired its first Economic Development Director to aid in the City's commercial growth.

The City Commission held a workshop with a consultant to discuss the City's vision and articulate the characteristics and needs in the next City Manager. The top seven (7) characteristics are: Team Builder; Experienced; Ethical; Visionary; Communicative; Confident and Results-Oriented. The next City Manager will be an approachable, confident and diplomatic leader of the utmost integrity.



Item 4A

## POSITION AND ORGANIZATIONAL PROFILE (CONTINUED...)

He/she must possess the ability to speak with all racial, ethnic and economic groups; with both intelligence and "street smarts/ experience;" Mutual Respect; the Ability to Sell Ideas; Experience in Team-Building and Implementing Strategic Plans; Contemporary Skills, i.e., technology, new ideas, etc.; the Ability to Work with other Cities/County/State/ Federal Government; and be a Resourceful/ Creative Fund-Raiser and Budget Manager.

The ideal candidate has been described by the Commission and staff as having

excellent people skills with the ability to demonstrate empathy in challenging environments. The successful Candidate will have proven experience in making difficult recommendations with follow-through on these decisions in a timely fashion. He/she will be politically astute and a collaborator on regional issues. Most importantly, the new City Manager will be a high-energy, proven manager and leader with the ability to assist a diverse Commission, with engaged Boards and community leaders in the decision-making process.

## CURRENT ISSUES

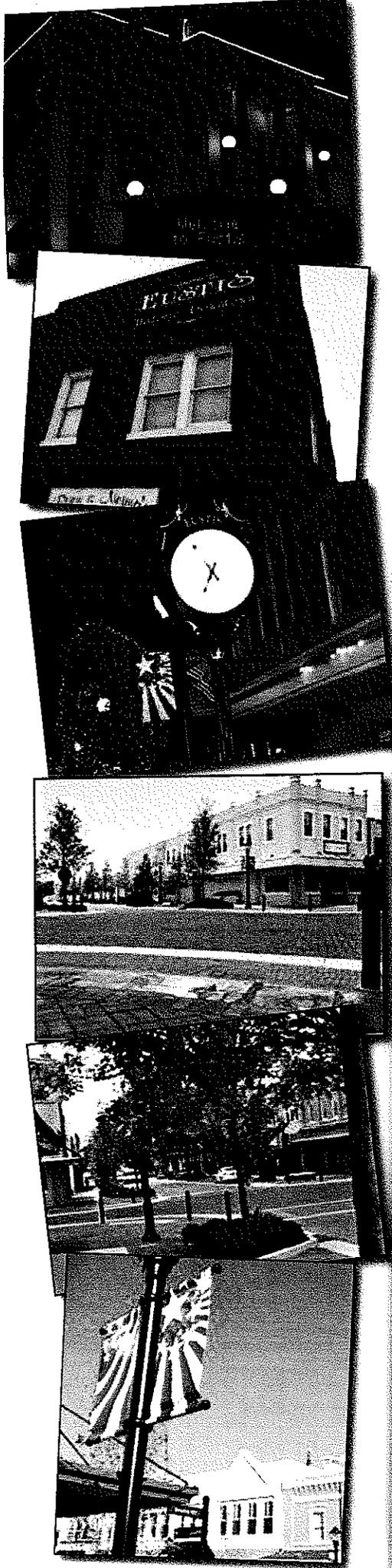
The following listing is representative of the challenges and opportunities the new City Manager will face in the first twelve to eighteen months on the job and is not intended to be a comprehensive listing. This list was compiled after discussions with the Mayor, City Commissioners, the Acting City Manager and Department Directors.

**Leadership Transition** - The next City Manager must be purposeful in establishing him/herself in this leadership role. He/she must be committed to learning and respecting the City and all of the constituencies in the City of Eustis. This includes respecting its "small town nature," while having ideas and expectations for it being the best City possible. This role is expected to provide the Department Directors direction, while asking for and respecting their input and/or suggestions.

**Strategic Planning** - The City's Strategic Plan was developed in 2013 and the next City Manager is expected to validate and work with all constituencies in the implementation of this plan. The Goals are as follows:

- To be a beautiful, livable City with a vibrant lakefront identity
- To expand the local economy
- To provide quality, cost-effective public services.

**City Economic Growth** - The City has accomplished a lot since the recession, giving raises for the first time last year after facing layoffs and budget cuts in recent years. The City is seeking a strong fiscal and growth-oriented leader, with the ability to lead the effort to achieve long-term growth with the support of the Commission and the City's leadership team.



## EDUCATION & EXPERIENCE

The successful candidate will have a strong background and knowledge of municipal finance, economic development and community redevelopment. The Commission is seeking a leader that has a reputation as being an effective team-builder; with a record of being an ethical, highly communicative and confident leader. He/she must be able to speak with all ethnic and racial groups, display both intelligence and street-smarts with the ability to convey mutual respect for all constituencies. He/she must demonstrate the ability to sell ideas, lead a team in the development and implementation of a strategic plan with strong technical skills. Prior experience as a City Manager or Administrator is preferred. Strong consideration will be given to candidates who have 5 - 10 years experience as a City Manager/Administrator, Assistant City Manager/Administrator or department head with direct exposure to an elected body. A Bachelor's degree in Public or Business Administration, Government Operations, or a similar program is required with an advanced degree preferred. Substantial experience leading diverse and complex communities and commissions is highly desirable. The City Manager must have a demonstrated track record of working effectively with elected officials, senior leadership, engaged citizenry and professional organizations.

The City Manager must have proven experience successfully managing consultants, contracts and vendors, and a demonstrated track record of working effectively with elected officials, senior leadership, an engaged citizenry and professional organizations. The next City Manager must be a person with strong values and ethical standards, and a model of professionalism for the organization.

## COMPENSATION AND BENEFITS

The starting salary and benefits are highly competitive and negotiable, depending upon the experience and qualifications of the successful candidate, with an anticipated starting range of the low- to mid-\$100s, a city-provided vehicle, the ICMA 401(a) retirement plan, the ICMA 457(deferred compensation program), health, dental, vision and life insurance, paid leave and other benefits. The State of Florida has very favorable tax advantages that make it attractive to live and work in the State and the City of Eustis, constituting significant additional benefits for the successful candidate. **The successful Candidate is required by City Charter to become a resident of the City of Eustis.**

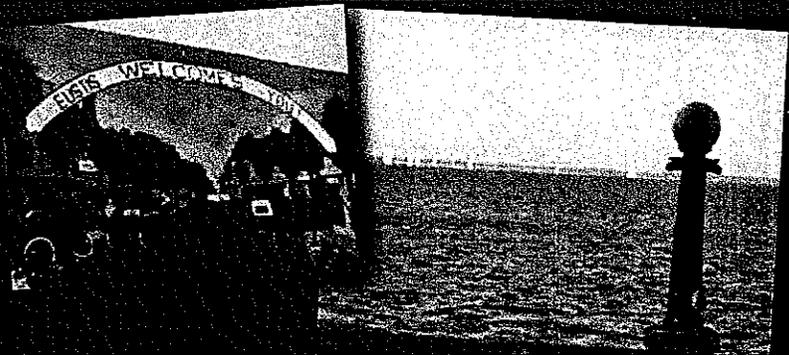


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## APPLICATION & SELECTION PROCESS

Qualified candidates please submit your resume online by visiting our website at [www.watersconsulting.com/recruitment](http://www.watersconsulting.com/recruitment). This position is open until filled; however, the first review of applicants will take place **July 24, 2014**. Following the first review date, resumes will be screened in relation to the criteria outlined in this brochure. Candidates with relevant qualifications will be given preliminary interviews with the Consultant. Those deemed qualified will be referred to the hiring authority for further consideration. Final interviews in **EUSTIS** will be offered to those candidates named as finalists, with reference checks conducted after receiving candidates' permission. The final interview process will be held in **mid/late-August 2014**.

For more information, please contact:

**Andrea Battle Sims**

**Phone: (216) 695-4776 (direct)**

**Toll free: (877) 356-2924**

**[www.watersconsulting.com/recruitment](http://www.watersconsulting.com/recruitment)**

**Visit the City's website at [www.eustis.org](http://www.eustis.org)**

Applicants selected as finalists for this position will be subject to a criminal history/credit/driver's license check prior to the interview. Florida "Sunshine" or public disclosure laws require that candidate information presented for consideration may be made available upon request by any interested parties.

The City of Eustis is an Equal Opportunity Employer and values diversity at all levels of its workforce!



Helping

**PUBLIC & PRIVATE**

**SECTOR CLIENTS**

managing their needs



**CITY OF DELTONA**

**RFP#15004 EXECUTIVE SEARCH FIRM**

The goal of the Selection Committee is to determine which firm(s) demonstrate the ability to provide the highest quality of service at the best cost using the criteria as listed in the RFP document. The Committee shall independently score proposals received and determine which firms are most highly qualified to perform the required services. A Selection Committee Meeting will then be scheduled when Committee members can discuss their scoring and determine whether or not interviews are necessary. If not, members will try to come to a consensus on the final ranking.

<b>NO.</b>	<b>CRITERIA</b>	<b>POSSIBLE POINTS</b>	<b>Colin Baenziger &amp; Associates</b>	<b>Management Partners, Inc.</b>	<b>The Mercer Group, Inc.</b>	<b>S. Renee Narloch &amp; Assoc.</b>	<b>Waters &amp; Company</b>	<b>NOTES: Use this section to justify your decision and for discussion at the Selection Committee meeting.</b>
1	Tab 1: Executive Summary	0						
2	Tab 2: Prior Experience and Success Rate	20						
3	Tab 3: Past Performance	20						
4	Tab 4: Cost	20						
5	Tab 5: Understanding of Project and Project Requirements	20						
6	Tab 6: Approach and Method	10						
7	Tab 7: References	10						
8	Tab 8: City Forms	0						
		<b>100</b>						

**Committee Members:**

Mayor and Commissioners

**Final Ranking**

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

**Selection Committee Member Signature**

Does the Committee Member want interviews scheduled with selected firms:

CITY OF DELTONA

Yes \_\_\_\_\_ No \_\_\_\_\_

Date: \_\_\_\_\_