DUBLIN CITY COUNCIL
ADMINISTRATIVE COMMITTEE OF THE WHOLE
Monday, July 21, 2014
6:00 p.m. – Council Chambers

AGENDA

- Call to Order
- Discussion of Proposed Timeline
- Review of Search Firm Proposals
- Selection of Firms to be Interviewed July 28-30
- Adjourn

PROPOSED TIMELINE

PHASE ONE – WEEK OF JULY 7, 2014

- Collect and distribute search firm information and draft RFP to Council members (June 7)
- Administrative Committee meets to discuss draft timeline and search firm list (July 8)
- Draft timeline provided to Council; asked to provide additional search firm names (July 8)
- Search firm RFP sent out by staff (July 8) – deadline of July 18 for submission
- Community Relations updates City Manager recruitment profile, including Council goals and the City's focus on the Bridge Street District initiative

PHASE TWO – WEEK OF JULY 14, 2014

- Staff distributes draft job announcement to Council members
- Staff distributes updated draft of City Manager recruitment profile to Council members (early in week)
- Council members provide input (by end of week) to Clerk of Council regarding draft profile and draft job announcement – Clerk provides summary of input to Council and staff
- Staff distributes summary of responses to RFP (July 18 evening)

PHASE THREE – WEEKS OF JULY 21/JULY 28

- **City Council selects search firms to be interviewed – July 21 Council meeting – 6 p.m.**
- **City Council meets with search firms and makes selection – July 28 Council meeting – 6 p.m.** (reserve evenings of July 29 and 30 if case needed to complete interviews and selection)

PHASE FOUR – DURING AUGUST

- Consultants interview Council members, City staff
- Job announcement placed in national sources
- Consultant delivers its input on draft Recruitment Profile to City Council
- **Comments and corrections to Profile noted by Council members to Consultant**
- Revised full Recruitment Profile delivered to all Council members
- Final brochure available for direct recruitment by Consultant

PHASE FIVE – DURING SEPTEMBER

- Update City Council with progress to date
- Application period ends, update Council with progress to date (Sept. 30)

PHASE SIX – OCTOBER/NOVEMBER/DECEMBER

- Consultant delivers Report of Leading Candidates to City Council, including resumes and notes from consultant's interviews (Oct. 6)
- **City Council reviews list of leading candidates with Consultant, recommends short list (Oct. 8)**
- Consultant confirms short list available; City announces Finalists (Oct. 15)
- Consultant conducts background investigation of Finalists
- Consultant delivers Final Report to City Council (Oct. 22)
- **City Council interviews Finalists (Oct. 28, 29, 30)**
- **City Council and Consultant negotiate contract with Finalist (Nov. 3-5)**
- **Employment agreement on Special Council meeting agenda (Nov. 10)**
- New City Manager joins City December 1, 2014 (two months on-the-job with Marsha)

*Bold print indicates actions by City Council

City of Dublin

Office of the City Manager
5200 Emerald Parkway • Dublin, OH 43017-1090
Phone: 614-410-4400 • Fax: 614-410-4490

Memo

To: Members of Dublin City Council

From: Michelle L. Crandall, Assistant City Manager

Date: July 18, 2014

Re: Executive Search Firms – Proposals Received

Summary

Attached are full proposals submitted by nine executive search firms in response to the City's RFP process. Also attached are evaluation forms to assist each Council Member in deciding upon his/her top 2-3 firms. These are included merely as a tool for you to use if you desire.

If you should have any questions regarding the information contained in this memorandum, please contact me at 410-4403 (desk) or 206-4886 (mobile).

Recommendation

Information only.

City Manager Search Process
Executive Search Firm
Evaluation Form

Consulting Firm:_____ Date:_____

Rater:_____ Total Score:_____

Rating Scale	
1 – Unacceptable:	Firm's experience, qualifications, expertise, methodology, philosophy, approach, performance, etc. are inadequate, irrelevant, unrelated, insufficient, or inappropriate for the project.
2 – Inadequate/Unsuitable:	Firm's experience, qualifications, expertise, methodology, philosophy, approach, performance, etc. are adequate, suitable, relevant, related, sufficient, or appropriate in some respects, but inadequate, unsuitable, irrelevant, unrelated, insufficient, or inappropriate in most respects.
3 – Adequate/Suitable:	Firm's experience, qualifications, expertise, methodology, philosophy, approach, performance, etc. are adequate, sufficient, related, relevant, or appropriate in all respects.
4 – More than Adequate/ Suitable:	Firm's experience, qualifications, expertise, methodology, philosophy, approach, performance, etc. are more than adequate, suitable, sufficient, related, relevant, or appropriate in some or most respects.
5 – Exceptional:	Firm's experience, qualifications, expertise, methodology, philosophy, approach, performance, etc. are clearly above adequate/suitable, sufficient, related, relevant, or appropriate in all or most all respects.

City of Dublin

Executive Search Firm
Evaluation Form

CRITERIA	MAXIMUM POINT VALUE	WEIGHTED VALUE
► Prior experience with conducting City Manager/CEO searches	5	
► Quality of the process for handling the search	5	
► Quality of the written proposal (comprehensive, well-written, clear, detailed)	5	
► Quality of the example position profile and example search report	5	
► Experience of the principal handling the search	5	
► Ability to adhere to the proposed timeline	5	
► Experience in recruiting a diverse candidate pool	5	
► Experience in pursuing well-qualified candidates (both those actively seeking and those not actively seeking employment opportunities)	5	
► Overall ability to deliver and perform the scope of services	5	

Executive Search Firms – Proposal Summaries

The following sheets provide summaries for nine Executive Search Firm Proposals in the following (random) order:

1. Colin Baenziger
2. Management Partners
3. GovHR USA
4. Ralph Anderson and Associates
5. The Novak Consulting Group
6. The Mercer Group, Inc.
7. Renee Narloch & Associates
8. Affion Public
9. PMG Employment Consultants

Executive Search Firms - Proposal Summaries

Firm	Recent Experience (past 36 months)	Proposed Process	Candidate Recruitment (methods to pursue well qualified and diverse candidate pool, including candidates are not actively looking)	Timeframe	Proposed Fees	Additional Notes
Colin Baenziger **Principal: Colin Baenziger** (professional background – page 18 of proposal) **Daytona Beach Shores, FL**	Provide examples of 40+ recent and current Manager/Administrator searches with in the past 36 months. Examples of searches from throughout the U.S. Extensive list of all searches in Appendix "A" Of note – City/County Manager searches are listed for Scottsdale, AZ; Roanoke, VA; and Coral Gables, FL.	Needs Assessment - Compile information on the community, interview, Council Members and other key stakeholders, determine characteristics of the ideal candidate determine a reasonable compensation package, finalize calendar for process. Develop Position Description/Recruitment Materials – Based on input gathered develop a position description and recruitment profile, provide draft for Council review. Recruit Candidates – Goal is to bring 6-10excellent semi-finalists for Council to select top 3-5. Accomplish through networking and diligent outreach and advertising in trade journals. Also e-mail recruitment profile to listserv of over 7,000 managers and professionals interested in local government management. Evaluate the Candidates – Resume review, screening interviews with potential top candidates, request candidate written introductions, check references and conduct background checks, internet search, education/work history verification. Prepare and Present Candidate Material - Written report prepared for each recommended candidate, Council selects top 3-5. Provide advice on interviewing and potential questions. Coordinate the Candidate Assessment Process – Prior to interview will recommend an interview/assessment process, recommend observing the finalists in a variety of settings, Day #1 – tour of community, evening reception with Council. Day #2 individual and group interviews with Council. Debriefing and Selection – Assist Council in decision-making process with defined methodology. Negotiations – Will assist with negotiations to the degree Council wishes. Provide advice on compensation package and contract.	Proposal notes an extensive network and states that "as we identify outstanding candidates (many of whom are not in the market), we will approach them and ask them to apply. Proposal also notes that "typically 40% of our finalists are women and/or minorities."	12-week schedule proposed Schedule outlined on page 11 of proposal	$23,000	Provided both an example Recruitment Profile/Brochure and an example Recruitment Report.

Executive Search Firms - Proposal Summaries

Management Partners **Principal:** **Doug Plunkett** (professional background – page 4 of proposal) **Cincinnati, OH**	Noted under "References" 6 similar searches completed in the past 36 months. All of these have been for cities/villages in Ohio. Of note - City/Village Manager searches are listed for: Brunswick OH and Hamilton, OH.	Develop the Profile – Interview with each Council Member to identify important qualities and characteristics desired. Understand culture and strategic goals. Develop A Search Strategy – Identify target networks and organizations for reaching those who would be outstanding candidates. Includes specific organizations and networks for reaching women and minority candidates. Conduct an Aggressive Recruitment Campaign – Network throughout Ohio and the United States. Targeted advertisements and direct/personal contact with those that would be the best fit. Acknowledge Resumes and Screen Prospective Candidates – Screen resumes and select most highly qualified for personal interviews and reference checks. Conduct Interviews/Check References – Conduct preliminary interviews face-to-face, video conferencing or telephone, rank and select top candidates to bring forward. Identify Finalists – Meet with Council to review top candidate and determine those Council wishes to interview, check professional references, conduct background, credit and education checks. Assist with Interview and Selection Process – Provide background information, and facilitate the interview process. * note – nothing included regarding assisting with negotiations.	Proposal notes that "we start with the premise that we want to attract the best people in the field, whether or not they are looking for a new job." Also note that the "strategy includes specific organizations and networks for reaching women and minority candidates..."	90 days Proposed timeline not included. Note that they will work with client to develop timeline.	$17,990	Provided both an example Recruitment Profile/Brochure and an example Recruitment Report (blank example report)	

Executive Search Firms - Proposal Summaries

GovHR USA (formerly Voorhees) **Principal: Heidi Voorhees, Co-Owner** (professional background - pages 3-4 of proposal) **Northbrook, IL**	43 City Manager/ Administrator searches completed in past 36 months. 28 of these were for communities in Illinois. - 7 in population 50,000 or greater - 12 in population 25,000 – 50,000 - 24 in population under 25,000 Of note - City/Village Manager searches are listed for: Fayetteville, NC; Kalamazoo, MI; Highland Park, IL	Six phases identified: <u>Position Assessment, Job Announcement and Brochure Development, Recruitment Timetable</u> - One-on-one interviews with each Council Member and senior City Staff, as well as any others deemed appropriate. <u>Advertising, Candidate Recruitment and Outreach -</u> Development of database of potential candidates unique to this position, outreach to potential candidates via e-mail, telephone and mail. <u>Candidate Evaluation and Screening</u> - Development of key traits matrix, identify 15-20 semifinalists to interview via Skype and phone, narrowing to the most qualified to present to Council. <u>Presentation of Recommended Candidates</u> – Recommendations via a recruitment report and 2-3 hour meeting with Council to review the candidates in detail. <u>Interviewing Process</u> – To include two rounds of interviews and an optional community "meet and greet". Recommend 5 candidates for first round and 2-3 candidates for the final round. <u>Appointment of Candidate</u> - Will assist to the degree requested with salary and benefit negotiations and drafting of an employment agreement.	Proposal notes that "we are able to contact potential applicants who are not actively seeking a new position but who may be interested in the Dublin opportunity." Further note having an extensive database to develop a diverse pool of well qualified candidates. Proposal also states that "as a former City Manager, Ms. Voorhees is acutely aware of the need to attract women and minorities to local government." She is a member of the Legacy Project, dedicated to the advancement of women in local government and is a member of the National Forum of Black Public Administrators.	12-week schedule proposed Can work with Council if a shorter timeframe is desired. Schedule outlined on page 7 of proposal.	$20,000 Includes $2,000 for advertising costs which could fluctuate. Client billed for actual cost.	Offer an optional 360-degree evaluation for the newly appointed City Manager after six months in his/her position. This would be an additional cost. Did not include an example Recruitment Report but did include a description of what is included in such a report.	

Executive Search Firms - Proposal Summaries

Ralph Anderson and Associates **Principal:** **Heather Renschler** (professional background – page 7 of proposal) **Rocklin, CA**	21 City Manager/Administrator searches completed in the past 36 months. 14 of those were for communities in California. Of note - City Manager searches are listed for: Cincinnati, OH (current search); Davis, CA; Oakland, CA.	Review Project Management Approach – Meet with Council and others to discuss work plan and timing of the search. Also meet with retiring City Manager. Develop Position Profile – Meet with City Council and other key stakeholders to gain an understanding of experience/background desired, develop recruitment brochure based on input gathered. Outreach and Recruitment – Placement of ads in ICMA, NLC and other professional journals and on-line sources. Use of extensive contacts to solicit interest and targeted phone outreach to professional associations. Candidate Evaluation – Screen applications, preliminary reference review, interviews with top group of candidates via Skype or telephone. Top 8 to 10 candidates brought forward and reviewed with Council. Search Report – Meet with Council to review search report, selection by Council of top 5-6 for in-person interviews by Council. Selection – This process will vary dependent upon Council's desires. Coordinate logistics, prepare interview booklet, suggested questions provided, attendance at interviews, verification/background checks of top 2 candidates. Negotiations – Available to assist in negotiating a compensation package and offering recommendations on compensation level.	Proposal notes and extensive network of contacts to draw from. Personal telephone outreach to those meeting criteria. Proposal also notes targeted outreach to recognized professional associations including OCMA, ICMA, NLC and the National Forum of Black Public Administrators.	90 days Notes that an additional 1-2 weeks should be assumed for negotiations with the top candidate. Schedule outlined on page 12 of proposal.	$29,750 Includes no more than 3 trips to the City by the Project Manager and 1 full background on selected candidate. Additional full backgrounds are $2,800/each.	Included an example Recruitment Brochure but did not include an example Recruitment Report.	

Executive Search Firms - Proposal Summaries

The Novak Consulting Group **Principal:** **Julia Novak** (professional background - page 6 of proposal) **Cincinnati, OH**	9 City Manager/Administrator searches completed in the past 36 months. 5 of those were for communities in Ohio. Of note - City Manager searches are listed for: Cleveland Heights, OH; Hudson, OH; and Shoreline, WA	**Approach and Methodology** Inquiring, Understanding and Defining – Work with Council to conduct a needs analysis, qualifications and 6-12 month goals for the successful candidate. Build accurate position profile. Candidate Search and Evaluation – Search process customized to meet client's needs. Extensive network nationally to target a diverse candidate pool. Supporting Success – Support candidate's long-term success by creating a goals-driven work plan. Use objectives gathered during inquiry stage to prepare selected candidate for success. **Work Plan** Develop Candidate Profile – One-on-one discussions with each Council Member to understand individual expectations and shared goals. Then meet with City Council as a body. Based on this input, develop a recruitment plan, position profile and 12-month goals for selected candidate. Conduct Aggressive Recruitment – Will prepare and place all ads in state and national publications. Identify individuals to contact via phone and e-mail outreach. Also use social media platforms for outreach. Begin process of actively/aggressively identifying qualified candidates as soon as ads are placed. Extensive experience working with jurisdictions across the country/national network. Facilitate City Manager Selection – Screen applicants against profile and 1st year goals, conduct in-person or phone conversations with semi-finalists, review list of top applicants with Council, finalize a list of approximately 5 candidates to invite for interviews with Council. Check references of top candidates, review published information and perform background checks. Facilitate the interview process and assist with employment agreement/negotiations (as desired).	Proposal states they have had the opportunity to work with cities and counties across the country and have developed an extensive network, allowing them to find a qualified and diverse pool of candidates. Note that "often the professionals who best fit an open position are already employed and are not looking for a traditional job posting." Note that in seven recent manager recruitment females were appointed. Advertise in ICMA, OCMA, NFBPA and IHN to reach a diverse group of candidates.	14-week schedule proposed Would review with City Council during initial project meeting. Schedule outlined on page 12 of proposal	$21,000 - $23,000 (base) Range contingent upon Council direction regarding community engagement and number of interviews. Additional costs: - $1,000-$1,500 for advertising - Background checks $175.00/finalist	Provided both an example Recruitment Profile/Brochure and an example Recruitment Report (marked confidential) Include first 12-month goals for selected candidate and Council to use as a road map and benchmark.	

Executive Search Firms - Proposal Summaries

The Mercer Group, Inc. **Principal: James Mercer** (professional background –page 8 of proposal) **Sante Fe, New Mexico**	37 City Manager/Administrator searches completed in the past 36 months. These searches covered a variety of states/regions. Firm conducts approximately 65 searches/year. Of note - City Manager searches are listed for: Arlington, TX; Des Moines, IA; Troy, MI	Position Analysis - Extensive consultation with Council, individual interviews with Council Members, key staff, citizen organizations and others as requested to identify expectations, perceptions and concerns regarding the position. Based on feedback, will prepare a draft position profile to review with Council. Recruitment Process - Review database for qualified candidates, rely most heavily on contacts nationally. Provide Council with advertising alternatives and costs, place ads in professional journals/websites/minority and women's publications. Resume Review – Review candidates against position description. Candidate Screening – Screening of candidates against the recruitment profile, conduct telephone and/or video conferencing with select candidates, select those who most closely match criteria, development of a matrix of top candidates to be reviewed with Council, further interview those selected by Council Also at this stage, ask candidates to provide information about their accomplishments, management style and philosophy, further testing (if requested) having candidates complete management and leadership style inventories. Background Investigations – Check references (including beyond those given) by candidate, verify education, credit & criminal check, Psychological (if requested). Interview Process – Recommended list compiled with a written summary of each (group of 5-7), recommendations interview format, setting, process, coordinate interview process. Negotiations – Assist with salary and benefits etc. Conduct session with Council and new Manager to establish goals.	State in proposal that, beyond their database of potential candidates, they rely heavily upon their network of contacts. Proposal also notes that "we have a number of minority and women placements in key executive positions and are proud of that record."	90-120 days No timeline included	$15,000 (base) Includes discount for repeat business of $1,500 Additional cost: $8,000 for expenses (not to exceed)	Provided both an example Recruitment Profile/Brochure and an example Recruitment Report.	

Executive Search Firms - Proposal Summaries

S. Renee Narloch & Associates **Principal:** **Renee Narloch** (professional background – page 6 of proposal) Note: Ms. Narloch is a former recruiter for Bob Murray and Associates (our intent was to solicit Bob Murray & Associates, however Renee Narloch was still listed as that firm's East Coast contact, so she responded to the RFP instead of Bob Murray) **Tallahassee, FL**	Proposal lists all placements, regardless of position from 2010-present. A large percentage of the searches were for communities in Florida. Of this list, in the past 36 months 8 of these searches were for City or County Managers. Of note - City/County Manager searches are listed for: City of Fort Lauderdale, FL; City of Topeka, KS; City of Dallas, TX; City of Miami Beach, FL.	Developing the Candidate Profile – Work with City staff and others involved with process to develop profile. Meet with key individuals. Discuss expectations regarding salary for position. Advertising Campaign and Recruitment Brochure – Develop a professional brochure, advertise in professional journals including ICMA, social media outlets, mail brochure to an extensive audience. Recruiting Candidates – Cross-reference profile with database, aggressive outreach effort including personal phone calls to prospective applicants. Note actively pursuing those not currently looking for a position. Screening Candidates – Screen candidates using profile criteria. Preliminary Interviews – Conduct with top 10-12 candidates. Devote attention to determine likelihood of candidates' acceptance of position if offered. Public Records Search – Review of published articles that reference each candidate. Recommendations – Typically recommend 3-5 candidates for consideration by Council. Final Interviews – Design a process that fits the organization's needs – traditional interviews, multiple interview panels or assessment center process. Goal to ensure each candidate has a very positive experience. Background Checks/Detailed Reference Checks – Conduct credit, criminal, civil litigation and motor vehicle record checks for top one to three candidates, as well as reference checks. Negotiations – Advise regarding current approaches, represent the interests of the City and will advise regarding salary, benefits and employment agreement.	Proposal states that they have a national network of contacts and database of potential candidates. Also states that they will "conduct an aggressive outreach effort that includes making personal calls to prospective applicants..." Further note 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."	16-week schedule proposed Proposal states they would be prepared to make recommendations regarding finalists within 75-90 days from start of project. Schedule outlined on page 10 of proposal.	$22,000 Includes expenses not to exceed $7,500 (billed for actual expenses)	Provided example Recruitment Profile/Brochure. Did not provide an example Recruitment Report.	

Executive Search Firms - Proposal Summaries

Affion Public **Principal:** **Scott Reilly** (professional background – page 12 of proposal) **Camp Hill, PA**	12 City Manager/Administrator searches completed in the past 36 months. Examples of Searches from throughout the United States, with many from Texas. Extensive list of all searches provided on pages 18-23 of proposal. Of note - City Manager searches are listed for: El Paso, TX; Hollywood, FL; and East Lansing MI.	Establishing Timeline – Work closely with Council to determine ideal start date for Manager and agree on target dates and activities. Input from Key Decision Makers – Meet with Council and others to seek input. . Public input included if desired. Developing the Candidate Profile - Development of position and the candidate profile based on input gathered. Understand culture, organization, ideal management style, and desired skills/traits/competencies. Candidate Pool – Use internal database to draw upon potential candidates with whom they have built relationship and/or referrals. Targeted recruiting and personal (telephone or in—person) outreach. Identify individuals that have been successful in similar organizations Screening Process – Conduct interviews to qualify each candidate and conduct background checks before presenting top candidates to Council. Candidates for Client Review – Present a comprehensive portfolio of top 6-8 candidates to Council and review skills and qualifications in detail. Choosing Finalists and Interviews – Assist Council in selecting finalists, initiate/facilitate interview process. Typically suggests panel interviews and a candidate presentation. Hiring – Pre-qualify all candidates regarding salary range and assist in all final employment/negotiations matters.	Proposal notes that they have and "continue to build and expansive network of candidates that includes the best and brightest in the public sector." Extensive "Statement of Diversity" included on page 11 of the proposal. Includes statement that "we are proud of our success in ensuring a diverse candidate pool and thrilled to have placed multiple women and minority candidates in executive level municipal positions, nationwide."	90 days Proposed project timeline provided on page 14 of proposal.	$21,000	Provided both an example Recruitment Profile/Brochure and an example Recruitment Report.	

Executive Search Firms - Proposal Summaries

PMG Employment Consultants **Principal:** **Phil Georgenson** (professional background – pages 6-7 of proposal) **Dublin, OH**	All Recent searches are specific to the private sector. A listing of those searches is provided on page 4 of the proposal. Additionally a listing of all companies/organizations they have had as clients is provided on page 5 of the proposal.	Understanding Position – Develop profile, establish hiring process and timeline, set expectations. Develop Search Plan – Identify sourcing methods, select industry specific association/member list, select advertising. Execute Search Plan – Personally reach out to hundreds of potential candidates, narrow search techniques, develop pool of candidates for screening. Candidate Screening – Conduct extensive phone interviews, viable candidates further interviewed in person or via videoconferencing. Candidate Selection – Select most qualified, develop portfolios, present to Council for selection of those to move on forward in process. Interview Process – Execute previously agreed upon interview process, organize interviews, debrief throughout process. Candidate Selection – Pinpoint leading candidates, check references, schedule aptitude or personality assessments. Offer – Ensure expectations are aligned on both sides, act as mediator in negotiations, facilitate acceptance and start date, Transition – Prepare candidate for resignation from current position, assist with relocation, maintain contact throughout process.	Note using an industry specific association and membership list and sourcing mechanisms such as social media and web crawlers. Also state in the proposal that they have "already identified hundreds of potential candidates or networking opportunities across the country using just one of these techniques."	Did not note in proposal	27.5% of the selected candidate's base salary	Provided sample candidate portfolio. Did not provide a Recruitment Brochure noting confidentiality of these with their clients. Would share (with permission of client) if selected for further consideration	

Executive Search Firms - Proposal Summaries

City of Dublin, Ohio

City Manager

Executive Search Firm Services

Request for Proposals

www.dublinohiousa.gov

I. Introduction

The City of Dublin, Ohio is seeking proposals from qualified firms/ providers to perform executive search services for the position of City Manager. The current City Manager has announced her retirement to be effective January 30, 2015 after serving the City for four years as City Manager (25 years with the City of Dublin). The City of Dublin will accept proposals from firms/providers interested in providing the requested services.

Proposals must be received by **no later than 5:00 P.M. local time on July 18, 2014**, at City Hall, Office of the Clerk of Council, 5200 Emerald Parkway, Dublin, Ohio 43017.

II. General Information

The City of Dublin, Ohio is a premier suburban community located in central Ohio, immediately northwest of Columbus and has a population of just over 42,000 residents, with a day-time population of over 70,000 corporate residents. The City operates under a Council-Manager form of government. The City Council is composed of seven (7) Members of Council, four who are elected by ward and three who are elected at large. The Mayor is elected from the seven Members of Council for a term of two (2) years, and the Members of Council are elected for regular terms of four (4) years.

Dublin has been recognized as a premier community, not only regionally, but also nationally and internationally. Home of Ohio's largest corporation, Cardinal Health (21 on the Fortune 500 List), Dublin is also the headquarters of the Wendy's Company, Ashland Inc., and the Online Computer Library Center (OCLC). Dublin's diverse and sound economic base of more than 3,000 businesses provides the foundation for the present and the future of the City. The City's continued economic vitality is the result of quality development, strategic planning and aggressive efforts to attract and retain high quality commercial development.

The City's current estimated total income tax revenues are $76.5 million. The 2014 Operating Expenditures are estimated to be $74 million, while the General Fund expenditures are estimated at $62.3 million. Dublin's 5-year Capital Improvements Program is $167.5 million with a 2014 Capital Projects budget of 54.4 million. The 2013 General Fund balance was $56million which was 99.26% of the year-end General Fund expenditures. Dublin's fiscally sound stewardship has earned the City the highest available bond ratings – Aaa from Moody's Investor Services and AAA from Fitch Ratings – a distinction carried by approximately three percent of rated cities nationwide.

Please see the attached recently completed director of public service recruitment profile for additional information about the City of Dublin and/or visit www.dublinohiousa.gov.

The City of Dublin Council is looking for a City Manager with the skills, abilities and proven track record to lead the City toward continued success in the coming years.

III. Scope of Work

Assist City Council with developing a process timeline; developing a candidate profile; recommending a salary range; advertising the position; directly soliciting candidates; reviewing initial candidates with the City Council; presenting a written report on background, strengths, and accomplishments; providing reference lists on each recommended finalist; facilitating the final interview process with some suggested interview questions; assisting the City with negotiating a contract; coordinating all correspondence, travel arrangements, and recordkeeping; and conducting detailed background and professional reference checks on recommended finalists, if requested.

During proposal development, respondent's questions regarding this RFP or the process should be directed to Tim Wagner, Director of Human Resources, via phone 614-410-4407 or e-mail twagner@dublin.oh.us .

The City of Dublin requests that respondents to the Request for Proposal do not contact other City staff or any member of the City Council during the proposal process and evaluation phase.

IV. Experience Requirements

Respondents are encouraged to provide the number of City Manager/Administrator placements the firm has successfully completed in communities of similar size, character and scope of services, including demonstration of the firm's experience with seeking a diversity of applicants, including female and minority candidates.

V. Response Form and Content

A. *Title Page:* Indicate the proposal subject, name of firm, local address, telephone number, name of primary contact person, and date of submittal.

B. *Introduction:* Briefly, introduce your firm, indicating whether the firm is local, regional, national or international. Provide a profile of the firm, including, but not limited to, the approximate number of professional staff employed, how long your firm has been in business and how long the firm has been conducting City Manager/Administrator searches. Indicate the name of the person(s) who will be authorized to make representation for and to bind the firm, their titles, and telephone numbers.

C. *Information Included in Response:*

1. Briefly state your understanding of the work to be performed. Include, but do not limit your statement to, the specific items requested in the Scope of Work.

2. Describe your proposed strategy to complete the recruitment, including a general statement of the philosophy of the firm and how the firm will tailor the process for Dublin's search. Indicate any additional information for consideration of your firm's qualifications for conducting this project.

3. Provide a list of the respondent's City Manager/Administrator successful placements in the past thirty-six (36) months, including the size of the municipality.

4. Provide contact names, telephone numbers and email addresses of these clients. The City reserves the right to contact any additional individuals or firms to obtain information about the respondent. If the firm has done no such searches, details should be provided as to how the firm would proceed with the search.

5. Indicate the names, titles, placement experience, and resume(s) of the person(s) who will be assigned to this project. A response to this requirement should include all contact information such as telephone number, e-mail address and web address.

6. Provide a detailed description of how the recruitment is to be conducted, including how the firm will identify and solicit outstanding candidates that are not actively seeking positions.

7. Discuss the general nature and extent of benefits the City of Dublin is reasonably likely to experience as a result of these services.

8. Provide a copy of a previous City Manager position profile your firm has completed which has similarities to the position with the City of Dublin.

9. Provide a copy of a previous City Manager search report your firm has completed for another client similar to the City of Dublin.

10. Provide a non-binding general indication (or range) of the cost of the services proposed with a complete description of the fee structure/breakdown.

11. Indicate the degree of participation by qualified minorities within the firm and/or sub-contracts with minority or women-owned business enterprises.

VI. Submission of Responses

A. *Acceptance/Rejection/Modification to Responses:*
The City of Dublin reserves the right to negotiate modifications to proposals that it deems acceptable, reject any and all proposals, and to waive informalities or irregularities in a proposal or in the proposal process.

B. *Economy of Preparation:*
Proposals should be prepared simply and economically, providing a straightforward, concise description of the respondent's ability to fulfill the requirements of the project.

C. *Cost of Preparation:*
The City shall not be liable for any costs incurred by a respondent in preparing or submitting a proposal.

D. *Ownership:*
Submitted materials become the property of the City and will not be returned.

E. *Public Records:*
Submitted responses and any agreement or other documents become public records that are subject to review and copying by any person making an appropriate request for public records.

VII. Due Date

Sealed proposal and ten (10) complete copies must be received at the Office of the City Clerk **no later than 5:00 p.m., July 18, 2014**. Proposals will not be accepted after this time. Proposals shall be addressed as follows:

ATTENTION CLERK OF COUNCIL, Anne Clarke
City of Dublin Municipal Building
5200 Emerald Parkway
Dublin, Ohio 43017

RFP EXECUTIVE SEARCH FIRM ENCLOSED

Each response shall be submitted in a sealed envelope prior to the time established for opening, and the envelope shall be marked with the title of the proposal and the proposal opening date. If submitted by mail, this envelope shall be enclosed in another envelope addressed to the City Clerk at the address specified above. If submitted other than by mail, it shall be delivered to the Clerk of Council. Proposals submitted by mail must be received in the Office of the City Clerk by the time specified herein.

VIII. Withdrawal from Consideration

A respondent may withdraw its proposal at any time prior to the submission deadline by submitting a written request for withdrawal to Anne Clarke, Clerk of Council, 5200 Emerald Parkway, Dublin, Ohio 43017. The request for withdrawal shall be signed by the respondent or an authorized agent. Modifications offered in any manner, oral or written, will not be considered after the deadline.

VIII. Selection Process

A. *Evaluation:*

1. The Members of the City Council shall review all proposals and evaluate them based upon the requirements given in this Request for Proposal including, but not limited to, the following criteria:

   a. Responsiveness of the proposal.
   b. Ability, capacity, and skill of the respondent to perform the services.
   c. Responses of the respondent's references.
   d. Methodology for conducting the recruitment.
   e. Experience of the respondent and individual members of the respondent's professional staff in performing similar services for similar sized municipalities.
   f. Experience with diverse candidates and placements, including female and minority candidates.
   g. The sufficiency of financial resources and ability of the respondent in performing the contract.
   h. The degrees of participation by qualified minorities within the firm and/or sub-contracts with minority or women-owned business enterprises.
   i. The firm's capability to meet the Scope of Work.
   j. The qualifications of the professional staff proposed for the project.
   k. Cost to provide the service requested.
   l. Other information as may be required or secured.

2. City Council shall review and evaluate all responses submitted to this Request for Proposals. They shall conduct a preliminary evaluation process of all proposals on the basis of information provided and other evaluation criteria as set forth in this Request for Proposals or as reasonably determined by City Council.

3. City Council will first review each proposal for compliance with the minimum qualifications and mandatory requirements for the Request for Proposals. Failure to comply with any mandatory requirements may disqualify a proposal. They may request one or more respondents to interview by telephone or in person.

4. City Council may require selected firms to be available to engage in a conference telephone call or attend a City Council meeting, or both, to respond to questions from City Council.

X. Conditions of Responses

A. *Completeness:*
All information required by the Request for Proposals must be supplied to constitute a legitimate proposal.

B. *Request for Proposals Clarification Request:*
During the period of evaluation, the City shall have the right to request clarification from the respondents. If any such respondent fails to respond to such a request within five (5) business days from the date of the request, the City shall have the right to reject the proposal.

C. *Oral Presentations:*
After all responses have been evaluated, City Council may require representatives of one or more of the respondents to appear and present before the City Council, at the respondents' expense, for the purpose of making a final evaluation and award. **These interviews are currently planned for July 28-30, 2014.**

D. *Award Presentation:*
Subject to agreement negotiation, the City Council shall select one of the proposals, or will reject all proposals within sixty (60) calendar days from the date of July 18, 2014.

E. *Completion of Project:*
It is the City's goal to have this project completed within four (4) months, and a final contract with a selected candidate negotiated by November 10, 2014.

F. *Contract Development:*
If the City selects a firm, City Council will conduct contract discussions and negotiations with the apparent successful respondent with the assistance of the City Attorney.

Appendix "A"
Recent Recruitment Profile Example
Dublin Director of Public Service

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

PROPOSAL TO PROVIDE EXECUTIVE SEARCH SERVICES TO FIND THE NEXT CITY MANAGER OF DUBLIN, OHIO

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***
Fax: (888) 635-2430

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

PROPOSAL TO FIND DUBLIN'S NEXT CITY MANAGER

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July 14, 2014

The Honorable Mayor Michael Keenan, Vice Mayor Richard Gerber and Council Members
Marilee Chinnici-Zuercher, Tim Lecklider, Greg Peterson and John Reiner
City of Dublin
c/o Office of the Clerk of Council
5200 Emerald Parkway
Dublin, Ohio 43017

Dear Mayor Keenan, Vice Mayor Gerber and Council Members Chinnici-Zuercher, Lecklider, Peterson and Reiner:

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.

CB&A is a national recruiting firm having conducted assignments across the country. 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 five of our local government clients have passed resolutions thanking us for our outstanding efforts in finding their key staff. We do not know how often you have passed a resolution thanking a consulting firm for its efforts, but we have rarely seen it happen. Our goal, in fact, would be for you to be our next client to pass such a resolution.

Some of our searches include the City Managers for Mt. Pleasant, MI; Portland, ME; Scottsdale, AZ; Greensboro, NC; Tacoma, WA; Roanoke, VA; Destin, FL; Yakima, WA and Monroe, NC. We have also sought the County Managers for Clackamas County, OR, Polk County, IA; Clay County, FL and Union County, NC.

Our current searches include, among others, City Managers for Coral Gables, FL, Oakland Park, FL and Titusville, FL. We are also recruiting for the County Administrators for James City County, VA, and Emmet County, MI.

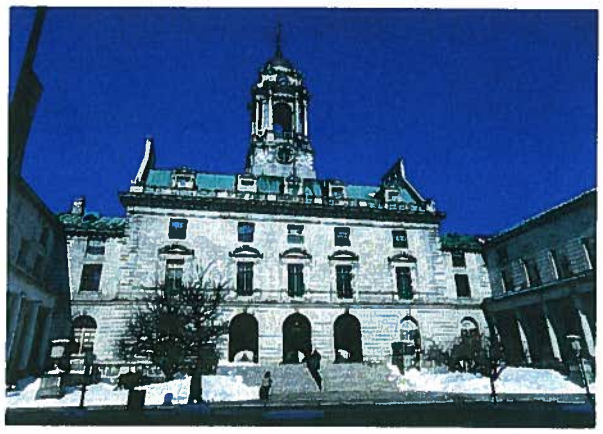
We look forward to formally presenting our credentials and working with you in the near future. If you have any questions, please feel free to contact me at (561) 707-3537.

Sincerely,

Colin Baenziger
Principal / Owner

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

Some of CB&A Clients…



City of Portland, ME

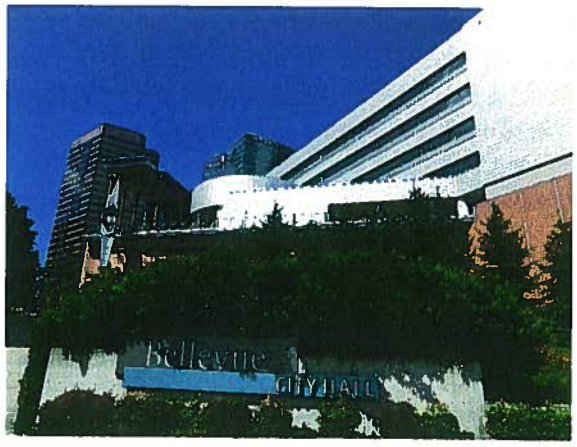
City Manager

City of Roanoke, VA

City Manager
City Attorney
Economic Development Director
Planning, Building and Development Director

City of Fayetteville, NC

City Manager



City of Bellevue, WA

City Manager

Section I: Search Methodology

The following search methodology has been refined over the past fifteen 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 Mayor and Council Members, other key parties and stakeholders. Our goal is to develop a strong sense of your organization, its leadership, its short and long term expectations, and its challenges;
- Determine the characteristics of the ideal candidate. These will likely include experience, longevity, education, personality, demeanor, and achievements as well as other items the Council Members and stakeholders consider important), and
- Determine a reasonable compensation package.

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

If the City wishes, we routinely incorporate meetings with other stakeholders (such as the business community, the non-profit community, City staff and so on) to gather their insights. These forums are valuable as they provide additional perspectives and a better understanding of the environment the Administrator 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

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), Ohio Municipal League and other similar organizations. We will also post it on our website: ***www.cb-asso.com***. We generally do not use newspapers or generic websites because while they produce large numbers of applications, they generally do not produce the type of candidates our clients are seeking.
- ***Email:*** We will also e-mail the recruitment profile to our listserv of 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.

Phase III: Screening and Finalist Selection

Task Four: Evaluate the Candidates

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

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

Specifically, our efforts will involve:

Step One. Resume Review. CB&A will evaluate all resumes and identify the 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 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:** We will ask candidates if there is anything controversial in their background that we should be made aware of prior to further consideration. While it is unlikely that we find anything not previously publicized in the press, we believe redundant checks offer superior security for our client.

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

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

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

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

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

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

Task Five: Preparation and Presentation of Candidate Materials

For the selected candidates, CB&A will compile the information we have developed into a written report for each recommended candidate. Specifically, this information will be the final pieces of the candidate reports and include: background checks and the references. These pieces can then be integrated with previously provided information to complete the report for each candidate. We will also provide some advice on interviewing, a series of questions the Council Members 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 conducting these checks is to develop a clear picture of the candidates and to determine which 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 Council Members 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.

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 Council Members observe the finalists in a number of settings. We will also recommend you invite the finalists' spouses so they can spend time in and evaluate your community.

Day #1: The finalists are given a tour of the community 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 Council Members 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 Council Members and the candidates get to know one another informally.

Day #2: Beginning at approximately 8:30 a.m., each candidate interviews individually with each elected official for approximately 40 minutes. These meetings provide the Council Members with an opportunity to assess how the candidates might interact with them on an individual basis. It is very important to know if good chemistry exists. Ultimately, Administrators succeed and fail based on their interaction with the Council Members and the one-on-one interviews are an excellent way to test that interaction.

After lunch, the Council Members as a group will interview each candidate so that they can assess the candidates in a formal meeting. Part of the interviews may include a PowerPoint presentation so the Council Members can observe the candidates' presentational skills.

Task Nine: Debriefing and Selection

Once the interviews have concluded, CB&A suggests the Council adjourn and hold a meeting a day or two later to select the next City 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.

Phase V: Negotiation and Continuing Assistance

Task Ten: Notification, Contract Negotiations and Warranty

Should the Council Members 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.

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 the City is expected to assume in the recruitment process.

Possible Project Schedule

The following is the schedule we would suggest and assumes CB&A is selected to complete the search by August 4th. We realize it may need to be adjusted to accommodate the Council Members' availability.

Phase I: Needs Assessment / Information Gathering

August 11th: CB&A begins working with the City Council Members to understand the job and its challenges. CB&A begins drafting the position description and recruitment profile for publications and prospective candidates.

August 18th: CB&A submits the draft of the full recruitment profile to the City for its review. Comments will be due back by August 21st.

Phase II: Recruiting

August 26th: CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to over 8,600 local government professionals.

September 19th: Closing date for submission of applications.

September 26th: CB&A reports the results of the recruitment to the Council Members.

Phase III: Screening, Reference Checks and Credential Verification

October 13th: CB&A forwards complete semi-finalist packages electronically to the City.

October 20th: City selects finalists.

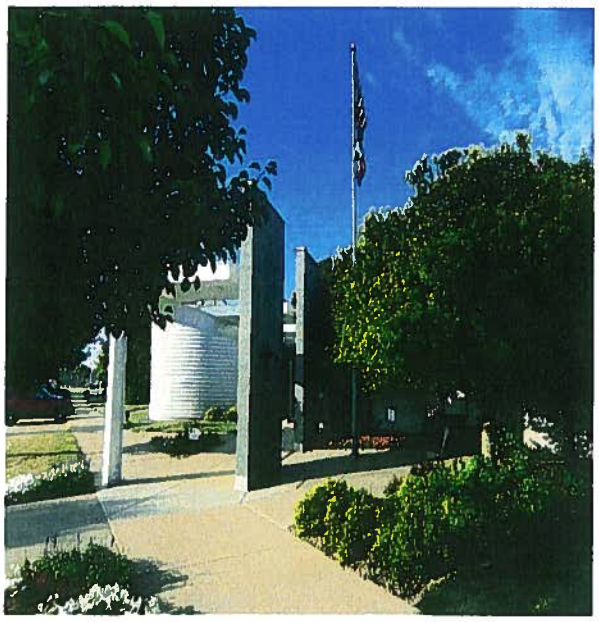
Phase IV: Interview Process Coordination and City Selection

October 31st: City holds reception for the finalists.
November 1st: One-on-one and full Council Interviews.
November 3rd: City selects its next City Manager.

Phase V: Negotiation, Warranty & Continuing Assistance

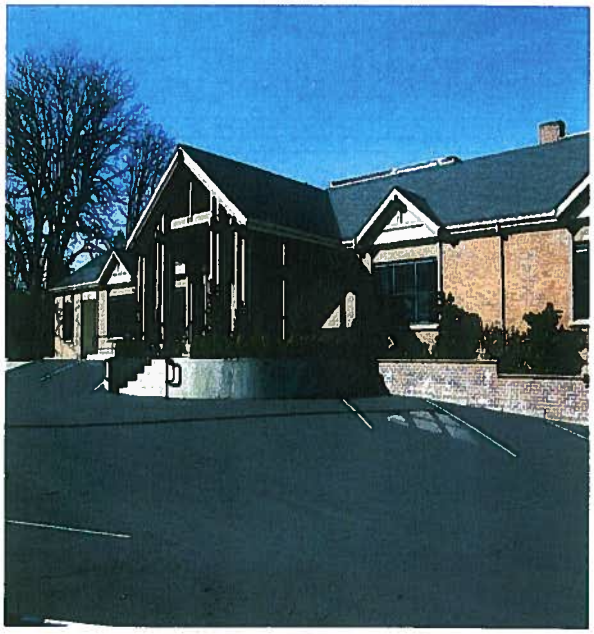
Post-Selection: CB&A works with City representatives and the selected candidate on an Employment agreement.

More CB&A Clients



City of Ankeny, IA

City Manager



Oregon City, OR

Finance Director

St. Johns County, FL

County Administrator
Director, Economic Development
Library Systems Director

City of Scottsdale, AZ

City Manager

Section II: Qualifications and Experience of the Firm

The Firm, Its Philosophy, & Its Experience

Colin Baenziger & Associates (CB&A) is a nationally recognized executive recruiting firm established in 1997 and owned and operated by Colin Baenziger. We are a sole proprietorship headquartered in Volusia County, FL with offices in 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 120 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.

Our Services:

Human Resources
Executive Search
Background Checks
Position Descriptions/Classification Studies
Compensation Studies
Personnel Policies/Procedures Reviews
Employee Handbooks

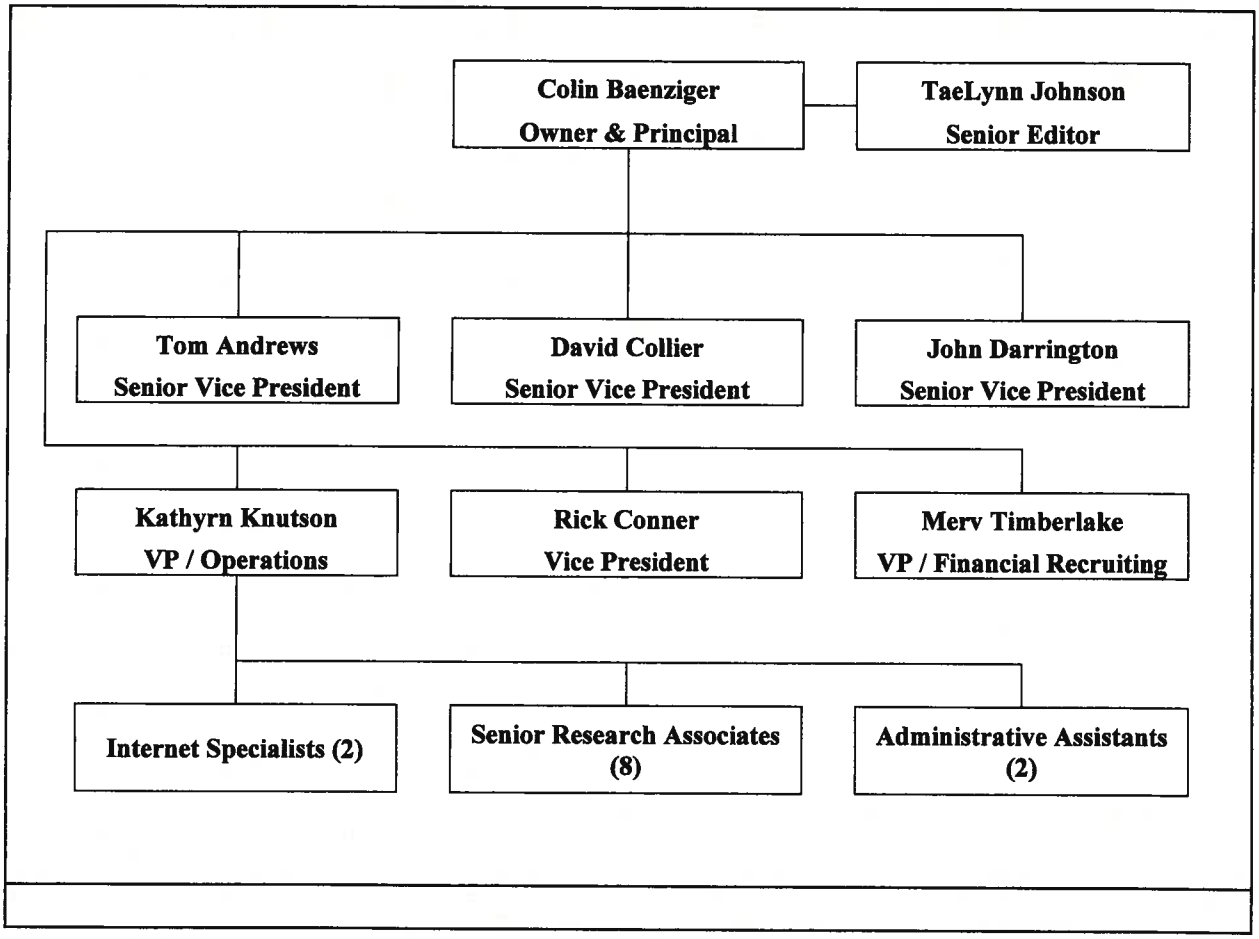
Operational Reviews
Performance Improvement
Contract Compliance Reviews
Project Management
Performance Measurement Systems
Standard Operating Procedures Manuals
Staffing Assessments

Additional Services
Preparing Grant Applications
Grant Monitoring Systems and Controls
Start-up Assistance to New Cities

Planning
Strategic Planning
Operational Planning
Project Planning

Technical Capabilities and Organizational Structure

Colin Baenziger & Associates has developed its business model over the past 15 years. The model has proven to be extremely effective in every state where we have applied it and for every type of position for which we have searched. In fact, we are often called when a government has a particularly difficult position to fill or where one of our competitors has failed. Overall, we utilize approximately eighteen people. Most staff members are independent contractors and are given assignments on a task order basis. Consequently we can pay well while having a great deal of flexibility without the overhead of many firms. In addition to Mr. Baenziger, other senior staff members are former City and/or County Managers or elected officials. As a result, we understand multiple perspectives and have been very successful in identifying the right candidates for our clients. CB&A's other staff are all competent researchers and writers and most have been with us for a long time.



Completion of Projects within Budget

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

Completion of Projects on Schedule

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

Diversity

CB&A has extensive contacts with individuals and organizations representing women and minorities. We are thus able to identify and bring a diverse group of finalists to the City. The proof is that from the beginning of 2009 through the end of 2011, forty-three percent of the individuals whom we placed as City and County Managers were minorities and/or women.

Prior Names and Litigation

Colin Baenziger & Associates has always operated under its current name and has never been involved in any litigation, except to testify as an expert witness on behalf of one of the parties. Our performance has never been questioned nor have we or any of our clients been involved in any legal action as a result of our work.

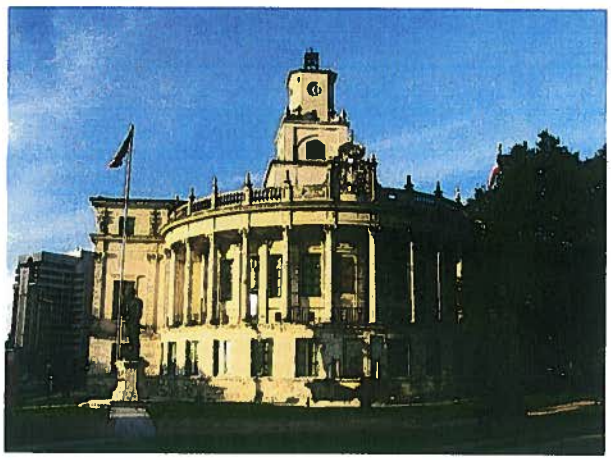
Insurance

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

Overall Executive Search Experience

A complete list of our searches is contained in Appendix A.

Some of CB&A Clients…



City of Coral Gables, FL

City Manager

City of West Melbourne, FL

City Manager

Brevard County, FL

County Manager

City of Miramar, FL

City Manager

III. Proposed Project Staff

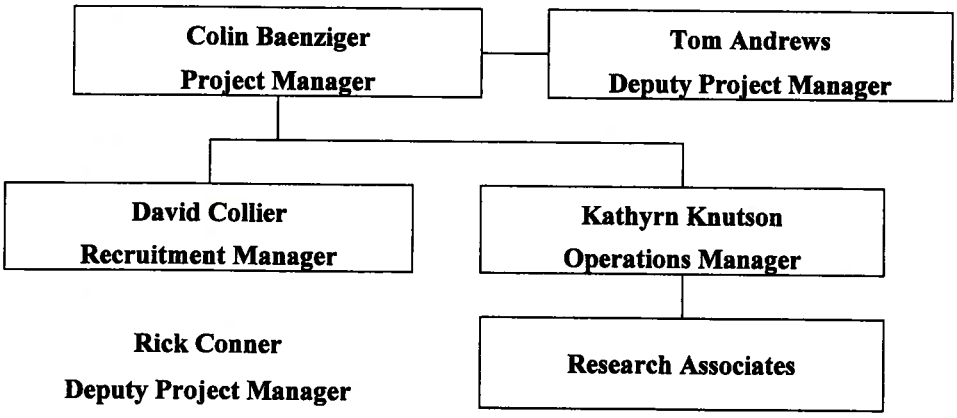
Project Team and Involvement

Colin Baenziger & Associates is an experienced recruiting firm which strongly believes that the majority of the search work should be conducted by one knowledgeable person. Colin Baenziger will be that person—he will serve as your project manager. He will conduct the interviews with the Council Members, 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 fifty senior level local government manager searches. Prior to starting CB&A, he spent over 20 years hiring key staff.

Tom Andrews, senior vice president, will be the Deputy Project Manager and support for Mr. Baenziger. Mr. Andrews will assist in virtually every aspect of the search effort but will focus on the search for strong candidates and candidate evaluation. Before joining 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 35 of his 40 years in government, Mr. Andrews hired key staff.

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. He is a past president of the Maryland City Managers Association and the Florida Association of County Administrators.

Kathyrn 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.



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.

Tom Andrews, M.S.

Senior Vice President

Since joining CB&A in 2008, Tom Andrews has been our management guru. With over thirty years management experience in federal, state and local governments, he has been there, done that. With his no-nonsense approach to problem-solving and his keen ability to recognize management talent and leadership potential, he is an asset to any client. His talent for mentoring has resulted in former employees occupying senior local government positions from Maryland to Florida.

In addition to his comprehensive and successful experience as a generalist, Tom possesses technical expertise in water resources management, environmental regulation, and public health programming.

Some of the top leadership positions that Tom has held include:
County Manager of Fulton County, GA; Chief Administrative Officer for Anne Arundel County, MD; Deputy Secretary, Maryland Department of the Environment; Assistant Secretary, Maryland Department of Natural Resources; Director, Maryland Water Resources Administration; and Chief of Staff for Maryland Acting Governor Blair Lee III.

Some of the many recruitments Tom has been involved in for CB&A are:

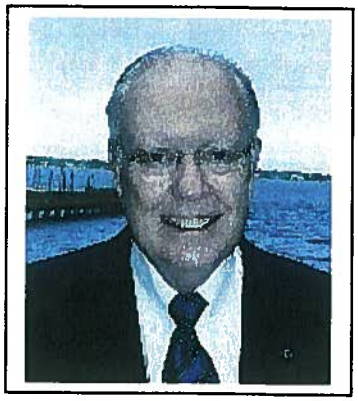
- Borough Manager, Matanuska-Susitna Borough, Alaska (population 88,000)
- Director, Watershed Management, DeKalb County, GA (population 691,900)
- City Manager, Greensboro, NC (population 259,000)
- City Manager, City Attorney and Planning Director, Roanoke, VA (population 96,000)
- County Manager, Brevard County FL (population 536,000)
- Deputy City Manager, Durham, NC (population 220,000)
- Director, Economic and Workforce Development, Durham NC (population 220,000)
- Budget Director, St. Petersburg, FL (population 248,000)
- Director of Economic Development for Loudoun County, VA (population 326,000)

In addition, Tom has conducted numerous leadership seminars for state and local government mid-level managers.

Tom earned his Bachelor of Science in biology from Miami University in Oxford, Ohio, and his master's in natural resources administration from the Institute of Public Administration of the University of Michigan. He has been a member of the Georgia County-City Managers Association, the Association of County Commissioners of Georgia, and the National Association of Counties. Tom has also served as President of the Maryland Association of County Health Officers, Member of the Anne Arundel County YMCA Board of Directors, and President of the Providence Center Board of Directors, a non-profit agency serving the developmentally disabled.

Dave Collier, M.P.A.

Senior Vice President



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

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

Dave has overseen the recruitment and selection of:

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

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

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

Rick Conner, P.E.

Vice President

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

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

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

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

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

- City Manager, Fayetteville, NC
- City Manager, Sarasota, FL
- City Manager, Cocoa Beach, FL
- Chief Executive Officer/General Manager, Des Moines (IA) Water Works
- Human Resources Director, West Palm Beach, FL
- Accounting Director for a medium size West Texas city
- Police Chief, Sunny Isles Beach, FL
- 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.

Kathyrn Knutson

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. Kathyrn currently resides in Oneida County, WI.

1) County Manager, Union County, NC (population 198,600)

Contact: Human Resources Director Mark Watson at (704) 283-3869, or **Watson@co.union.nc.us**

Cindy Coto

CB&A was formally selected to perform the County Manager on September 7, 2010. We were asked to conduct the search extremely quickly so that interviews could be conducted prior to the November election. We sought candidates from around the country, performed the candidate screening and interviews were held on October 22nd with a selection made on October 25th. The Commission selected *Ms. Cynthia Coto, formerly the County Manager of Volusia County, FL, and Seminole County, FL.* Ms. Coto signed a contract on October 29th and began work on November 15th.

2) County Manager Recruitment, Brevard County, FL (population 536,000)

Contact: Commission Chuck Nelson at (321) 454-6601 or **chuck.nelson@brevardcounty.us**
Human Resources Director Frank Abbate at (321) 633-2010 or **frank.abbate@brevardcounty.us**

Howard Tipton

Brevard County is located near Florida's east coast and is the home to the Kennedy Space Flight Center at Cape Canaveral. CB&A was selected in early May 2009 to the County's next **County Manager**. 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 July 31st and *Howard Tipton, former Deputy County Administrator for Orange County, FL,* was selected on August 4th.

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

Contact: Mayor Marilyn Strickland at (253) 591-5100 or **Marilyn.Strickland@cityoftacoma.org**
Human Resources Analyst Margith Baker at (253) 573-2321 or **MBaker@ci.tacoma.wa.us**

T.C. Broadnax

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

4) City Manager, Scottsdale, AZ (population 221,000)

Contact: Vice Mayor Suzanne Klapp at (480) 312-7402, or **sklapp@scottsdaleaz.gov**
Council Member Guy Phillips at (480) 312-2374, or **gphillips@scottsdaleaz.gov**

Fritz Behring

Scottsdale retained CB&A just before Christmas, 2012 to help find its next **City Manager**. We were asked to begin work in late February, 2013. We met with the Council Members and based on what we learned, we crafted a recruitment profile and began to search the country for outstanding candidates. Background checks were thorough and three finalists were selected. Interviews occurred on May 21st and 22nd and *Fritz Behring, County Manager, Pinal County, AZ,* was selected on the 22nd. Four weeks later, in mid-June, Mr. Behring was selected as American City and County Magazine's County Executive of the Year for his work in Pinal County.

5) City Manager, Hallandale Beach, FL (population 39,000)

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

Renee Crichton

Colin Baenziger & Associates was asked to conduct an expedited search for the **City Manager** on July 28, 2010. We produced a recruitment profile quickly and began recruiting candidates. The deadline for applications was August 24th. *Hallandale Assistant City Manager Mark Antonio* was selected on September. 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 Assistant City Manager with Miami Gardens, FL,* was hired.

Liane Stillman

6) Cottonwood Heights, UT (population 35,400)

Contact: Mayor Kelvyn Cullimore at (801) 568-7000, or **Kelvyn@dynatron.com**

Cottonwood Heights incorporated in November 2004 and is a suburb of Salt Lake City. The City needed a **City Manager** immediately and requested that Colin Baenziger and Associates have a field of candidates ready to interview on December 3rd and 4th. The City had already begun advertising with a closing date of November 22, 2004. Not impressed with the applications, we promptly recruited several more applicants, two of whom the City Council rated in their top three finalists after the interviews. The process was complicated by the Thanksgiving holiday. Nonetheless, we completed our work including background checks and conducted interviews so that the City did hire its manager on December 7, 2004. *Liane Stillman* was then selected to be the next City Manager.

Chris Morrill

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

Contact: Council Member Court Rosen at (540) 597-3193 or **courtrosen@gmail.com**
Former Council Member Rupert Cutler at (540) 345-7653 or **MRCutler@aol.com**
City Clerk Stephanie Moon at (540) 853-2541 **Stephanie_Moon@roanokeva.gov**

CB&A was hired in early September 2009 to find Roanoke's next **City Manager**. Roanoke is the cultural and commercial hub of southwestern Virginia. One of its primary employers is the Carilion Clinic with almost 8,000 employees. We were asked to identify someone with a strong background in finance and redevelopment. In preparation for the recruitment, we had five meetings to solicit public input (two with the public at large, one with the business community, one with the neighborhoods, and one with the education, social services and non-profit community). We also had a separate meeting with the media. Our efforts involved searching the country for strong candidates, conducting extensive background checks, recommending a strong field of candidates, overseeing the interviews and providing a small amount of assistance with the contract negotiations. *Christopher Morrill, formerly the Assistant City Manager for Savannah, GA,* was selected in early December 2009. We have since assisted the City in finding a **City Attorney**, an **Economic Development Director,** a **Finance Director,** and a **Planning, Building and Development Director**.

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

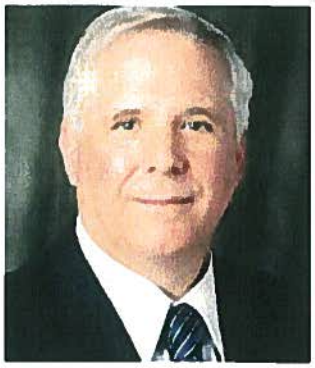
Contact: Commissioner Yvette Colbourne at
(954) 560-5161, or
ycolbourne@ci.miramar.fl.us

Kathleen Woods-Richardson

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

9) City Manager, Portland, ME (population 65,000)

Contact: Councilor Cheryl Leeman at (207) 773-4161
or **cl@portlandmaine.gov**



Portland retained CB&A on February 28, 2011 to help find its next **City Manager**. We met with the Council Members and with several groups of community stakeholders as well as the staff. Based on what we learned, we crafted a recruitment profile and began to search the country for outstanding candidates. Background checks were thorough and three finalists were selected. Interviews were held on May 20th and 21st and *Mark Rees, Town Manager of North Andover, MA,* was selected on May 21st.

Fee

CB&A offers a firm, fixed fee of $23,000. Note that this fee includes all CB&A's costs and expenses. 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 is fee structure is advantageous to both the City and CB&A: the City knows exactly what it will pay 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: Candidate Screening	$7,000
Phase IV: Interview Process Coordination / City Manager Selection	$1,750
Phase V: Negotiation and Continuing Assistance	$1,750

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 in the second year, CB&A will repeat the search for the reimbursement of expenses only.
3) If you are not satisfied with the candidates we present, CB&A will repeat the search until you are satisfied.
4) Our price is guaranteed and will not be exceeded for any reason, even if conditions change after the contract is executed.

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

PROPOSAL TO PROVIDE EXECUTIVE SEARCH SERVICES TO FIND THE NEXT CITY MANAGER OF DUBLIN, OHIO

Volume II: Appendices

Colin Baenziger & Associates

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

PROPOSAL TO FIND DUBLIN'S NEXT CITY MANAGER

VOLUME II: APPENDICES

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Appendix A

Searches by
Colin Baenziger & Associate' Staff

Governmental Search Assignments

Performed by the Staff of Colin Baenziger & Associates

Current Searches

City of Coral Gables, FL (population 49,411)
City Manager, Mount Pleasant, MI (population 26,000)
City Manager, Oakland Park, FL (population 42,800)
City Manager, Titusville, FL (population 43,940)
City Manager, Winchester, VA (population 26,000)
Township Manager, Springettsbury Township, PA (population 26,700)

County Administrator, Emmet County, MI (population 32,900)
County Administrator, James City County, VA (population 69,000)
County Administrator, St. Lucie County, MI (population 284,000)

Director, Building and Development, Loudoun County, VA (population 336,900)
Executive Director, Camden County (GA) Joint Development Authority (population 51,400)
Director, Human Resources, Roanoke, VA (population 99,000)
Director, Human Resources, Sunrise, FL (population 88,800)

Completed Searches in 2014

City Manager, Bellevue, WA (population 122,400) in 2014
City Administrator, Connell, WA (population 4,200) in 2014
City Manager, Ellensburg, WA (population 18,350)
City Manager, Elmira, NY (population 29,200) in 2014
City Manager, North Miami, FL (population 60,565) in 2014

Assistant City Manager / Utilities, Corpus Christi, TX (population 308,000) in 2014
Director, Human Resources, Gainesville, FL (population 125,000) in 2014
Finance Director, Roanoke, VA (population 99,000)
Director of Finance and Administration, Roanoke Regional Airport, Roanoke, VA, in 2014
Human Resources Director, West Palm Beach, FL (99,900) in 2014
Director, Parks and Recreation, Hobbs, NM (population (35,000) in 2014
Police Chief, Farmington, NM (population 45,900) in 2014
Solid Waste Director, Tampa, FL (population 335,700) in 2014
Director, Utilities, North Port, FL (population 57,300) in 2014

Governmental Search Assignments (continued)

Completed Searches Prior to 2014

City/Town/Village Manager/Administrator

City Manager, Alachua, FL (population 6,200) in 2001
City Manager, Albany, GA (population 75,600) in 2011
City Manager, Ankeny, IA (population 45,600) in 2013
City Manager, Ashland, KY (population 21,000) in 2013
Village Manager, Bal Harbour, FL (population 3,300) in 2013
City Manager, Bartow, FL (population 16,000) in 2007
Town Manager, Bay Harbor Islands, FL (population 5,200) in 2003 and 2007
Town Manager, Buckeye, AZ (population 32,000) in 2006
City Manager, Cape Canaveral, FL (population 10,200) in 2010
City Manager, Cape Coral, FL (population 154,300) in 2012
City Manager, Casselberry, FL (population 25,000), in 2005
City Manager, Chamblee, GA (population 17,000) in 2011
City Manager, Cocoa Beach, FL (population 11,200) in 2012
City Manager, Cooper City, FL (population 32,000) in 2008
City Manager, Coral Gables. FL (population 43,000) in 2009
City Manager, Cottonwood Heights, UT (population 34,000) in 2004
Town Manager, Cutler Bay, FL (population 35,000) in 2006
City Manager, Dania Beach, FL (population 28,000) in 2009
City Manager, Daytona Beach, FL (population 65,000) in 2002
City Manager, Deltona, FL (population 83,000) in 2006 and 2008
City Manager, Destin, FL (population 12,000) in 2003 and 2011
City Manager, Doral, FL (population 24,000), in 2004
City Manager, Doraville, GA (population 8,500) in 2013
Town Manager, Dundee, FL (population 3,000) in 2006 and 2009
City Manager, Eustis, FL (population 18,000) in 2007
City Manager, Fayetteville, NC (population 208,000) in 2012
City Manager, Fernandina Beach, FL (population 11,000) in 2006
City Manager, Fife, WA (population 8,700) in 2010
Town Manager, Fort Myers Beach, FL (population 6,900) in 2006 and 2008
City Manager, Fort Pierce, FL (population 41,900) in 2012
City Manager, Fruitland Park, FL (population 4,100) in 2013
Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1999 and 2005
City Manager, Gainesville, FL (population 117,000) in 2005
City Manager, Greensboro, NC (population 259,000) in 2009
City Manager, Gulfport, FL (population 12,000) in 2003
City Manager, Hallandale Beach, FL (population 39,000) in 2010 and 2012
City Manager, Holly Hill, FL (population 13,000) in 2008 (partial search)
City Manager, Homestead, FL (population 62,000) in 2010
Town Manager, Juno Beach, FL (population 3,600) in 2005
Town Manager, Town of Jupiter Island, FL (population 654) in 2005

City/Town/Village Manager/Administrator (continued)

Village Manager, Key Biscayne, FL (population 11,000) in 2007 and 2011
City Manager, Key West, FL (population 24,600) in 2012
Town Manager, Lake Park, FL (population 9,100) in 2001 and 2003
Town Manager, Lantana, FL (population 9,600) in 2000
City Manager, Lakeland, FL (population 87,000) in 2003
City Manager, Lake Worth, FL (population 37,000) in 2003 and 2007
City Manager, Lauderdale Lakes, FL (population 32,000) in 1998 and 2002
City Manager, Leesburg, FL (population 20,390) in 2013
City Manager, Madeira Beach, FL (population 12,300) in 2011
Town Manager, Mangonia Park, FL (population 1,400) in 2001
City Manager, Marathon, FL (population 11,500 in 2002 and 2004
City Manager, Marco Island, FL (population 15,000) in 2008
City Manager, Medina, WA (population 3,000) in 2013
City Manager, Melbourne, FL (population 72,500) in 2002 and 2012
City Manager, Miami Gardens, FL (population 101,000) in 2004
City Manager, Miramar, FL (population 122,000) in 2013
City Manager, Monroe, NC (population 33,500) in 2013
City Manager, Mount Dora, FL (population 12,000) in 2005
City Manager, Naples, FL (population 21,000) in 2003 and 2007
City Manager, New Smyrna Beach, FL, FL (population 23,000) in 2009
City Manager, Normandy Park, WA (population 6,335) in 2013
City Manager, North Miami, FL (population 62,000) in 2002 and 2010
Village Manager, North Palm Beach, FL (population 12,500) in 2004, 2005, 2007 and 2012
City Manager, North Port, FL (population 55,800) in 2011
City Manager, Ocala, FL (population 52,000) in 2008
City Manager, Orange City, FL (population 10,000) in 2010
City Manager, Orange Park, FL (population 9,100) in 2010
CAO, Orlando, FL (population 197,000) in 2005
City Manager, Oviedo, FL (population 33,000) in 2008
City Manager, Palm Bay, FL (current population 101,000) in 2002
City Manager, Palm Coast, FL (population 71,000) in 2006
Village Manager, Palmetto Bay, FL (population 24,000) in 2003
City Manager, Panama City Beach, FL (population 12,018) in 2012
Village Manager, Pinecrest, FL (population 19,300) in 2011
City Manager, Pompano Beach, FL (population 101,000) in 2007
Town Manager, Ponce Inlet, FL (population 2,500) in 2001
City Manager, Portland, ME (population 65,000) in 2011
City Manager, Riviera Beach, FL (population 37,000) in 2009
City Manager, Roanoke, VA (population 96,000) in 2009
City Manager, Sarasota, FL (population 55,000) in 2012
City Manager, Satellite Beach, FL (population 10,100) in 2013

City/Town/Village Manager/Administrator (continued)

City Manager, Scottsdale, AZ (population 217,400) in 2013 in 2013
Town Manager, Sewall's Point, FL (population 2,000) in 2006
City Manager, St. Pete Beach, FL (population 10,000) in 2001
City Manager, Stuart, FL (population 17,000) in 2006
City Manager, Sunny Isles Beach, FL (population 17,000) in 2006 and 2011
City Manager, Sunrise, FL (population 84,400) in 2012
City Manager, Sunnyside, WA (population 15,860) in 2013
City Manager, Tacoma, WA (population 200,000) in 2011
City Administrator, Tavares, FL (population 11,000) in 2006
City Manager, Treasure Island, FL (population 7,500) in 2004
City Manager, West Melbourne, FL (population 15,000) in 2009
City Manager, West Park, FL (population 12,000) in 2005 and 2010
City Manager, Woodstock, GA (population 21,000) in 2008
City Manager, Yakima, WA (population 91,000) in 2011 and 2012

County Manager - Completed Searches

County Manager, Baker County, FL (population 27,000) in 2006
County Administrator, Bay County, FL (population 158,000) in 2005
County Manager, Brevard County, FL (population 536,000) in 2009
County Administrator, Broward County, FL (population 1,800,000) in 2006
County Administrator, Clackamas County, OR (population 383,900) in 2013
County Administrator, Clay County, FL (population 160,000) in 2005 and 2011
County Administrator, DeSoto County, FL (population 34,000) in 2005
County Manager, Flagler County, FL (population (83,000) in 2007
County Administrator, Hernando County, FL (population 172,800) in 2012
County Administrator, Highlands County, FL (population 98,000) in 2008
County Manager, Lowndes County, GA (population 92,000) in 2001
County Administrator, Martin County, FL (population 140,000) in 2005
Borough Manager, Matanuska-Susitna Borough, AK (population 85,000) in 2011
County Administrator, Monroe County, FL (population 80,000) in 2004
County Administrator, Nassau County, FL (population 60,000) in 2004
County Administrator, Okaloosa County, FL (population 183,500) in 2013
County Administrator, Okeechobee County, FL (population 39,000) in 2008
County Manager, Osceola County, FL (population 235,000) in 2003 and 2007
County Administrator, Polk County, IA (population 400,000) in 2007 and 2011
County Manager, Seminole County, FL (population 410,000) in 2006
County Administrator, St. Johns County, FL (population 162,000) in 2007
County Administrator, Sumter County, FL (population 70,000) in 2005
County Manager, Union County, NC (population 198,600) in 2010

Governmental Search Assignments (continued)

Completed Searches – Assistant/Deputy Managers

Deputy City Manager for Community Building, Durham, NC (population 220,000) in 2009
Assistant City Manager / Operations, Corpus Christi, TX (population 308,000) in 2013
Assistant County Administrator for Development and Infrastructure, Hillsborough County, FL (population 1,000,000) in 2006
Assistant County Administrator for Human Services, Hillsborough County, FL (population 1,000,000) in 2004
Assistant Town Manager, Jupiter Island, FL (population 654) in 2010
Assistant Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1998
Assistant to the City Manager, Lakeland, FL (population 87,000) in 2004
Assistant City Manager, Lake Worth, FL (population 37,000) in 2004
Assistant County Administrator, Martin County, FL (population 140,000) in 2006
Assistant City Manager, Tamarac, FL (population 55,500) in 2001
Assistant City Manager, West Palm Beach, FL (population 101,000) in 2004
Deputy City Manager, Durham, NC (population 220,000) in 2009
Deputy County Administrator, Hillsborough County, FL (population 1,000,000) in 2004
Deputy County Manager, Polk County, FL (population 500,000) in 2006
Assistant City Manager, West Palm Beach, FL (population 101,000) in 2013

Completed Searches – City Attorneys

City Attorney, Roanoke, VA (population 96,000) in 2012
City Attorney, West Melbourne, FL (population 15,000) in 2008

Completed Searches – Community Development/Growth Management/Planning

Assistant Director of Community Development, Largo, FL (population 74,000) in 2004 and 2005
Community Development Director, Miami, FL (population 408,000) in 2008
Community Development Director, Safety Harbor, FL (population 18,000) in 2006
Community Development Director, Tamarac, FL (population 55,500) in 2007
Development Services Director, Daytona Beach, FL (population 65,000) in 2005
Director of Capital Projects, New Orleans, LA (population 323,000) in 2008
General Manager, North Sarasota Redevelopment District, Sarasota (population 53,000) in 2008
Growth Management Director, St. Lucie County, FL (population 261,000) in 2005
Growth Management Manager, Wellington, FL (population 55,000) in 2009
Housing and Community Development Director, West Palm Beach, FL (pop. 101,000) in 2007
Planning Administrator, Daytona Beach, FL (population 65,000) in 2007
Planning Director, Osceola County, FL (population 235,000) in 2005
Director of Planning, Building and Development, Roanoke, VA (population 96,000) in 2012

Completed Searches – Economic Development / Redevelopment

Economic Development Director, Charlotte County, FL (population 170,000) in 2007
Economic Development Director, Collier County, FL (population 328,000) in 2012
Assistant City Manager for Community Building, Durham, NC (population 220,000) in 2009
Economic Development Director, Roanoke, VA (population 96,000) in 2012
Director, Office of Economic & Workforce Development, Durham, NC (pop. 220,000), 2009
Economic Development Director, Loudoun County, VA (population 326,000) in 2010
Redevelopment Director, Daytona Beach, FL (population 65,000) in 2007
Economic Development Director, St. Johns County, FL (population 162,000) in 2011
Executive Director, Valdosta-Lowndes County Industrial Authority, GA (serving a population 92,000+) in 2006 and 2011
Executive Director, Technological Research and Development Authority, FL (serving a statewide population) in 2006

Completed Searches – Engineers

Director/Engineering/Public Works /Utilities, Hallandale Beach, FL (population 39,000) 2013
Assistant City Engineer, Melbourne, FL (population 75,000) in 2008
County Engineer, Polk County, FL (population 500,000) in 2006
Deputy County Engineer, Martin County, FL (population 140,000) in 2006
City Engineer, Gulfport, MS (population 90,000) in 2008
City Engineer, Sunny Isles Beach, FL (population 17,000) in 2006
Engineering Manager, Sumter County, FL (population 70,000) in 2005
Staff Engineer, Wellington, FL (population 55,000) in 2009

Completed Searches – Facilities Management

Centroplex Director, Orlando, FL (population 197,000) in 2004
Lakeland Center Director, Lakeland, FL (population 87,000) in 2004
Director, Landscaping, Weston, FL (population 65,300) in 2013

Completed Searches – Finance and Budget

Budget and Financial Services Director, Polk County, FL (population 500,000) in 2006
Budget Director, St. Petersburg, FL (population 248,000) in 2009
Controller, City of Orlando, FL (population 197,000) in 2007
Chief Financial Officer, Hillsborough Area Regional Transit, FL (population 1,000,055) in 2005
Chief Financial Officer, City of Orlando, FL (population 87,000) in 2005
Deputy Director of Management, Budget and Accounting, Orlando, FL (pop. 197,000) in 2004
Director, Management & Financial Services, Loudoun County, VA (population 326,000) in 2012
Finance Director, Altus, OK (population 19,800) (background check) in 2012
Finance Director, Daytona Beach, FL (population 31,860) in 2012

Completed Searches – Finance and Budget (continued)

Finance Director, Fort Walton Beach, FL (population 20,000) in 2006
Finance Director, Lauderdale Lakes (population 32,000) in 1998
Finance Director, Miami, FL (population 408,000) in 2013
Finance Director, Oregon City, OR (population 31,860) in 2012
Finance Director, St. Petersburg, FL (population 248,000) in 2010
Finance Director, Sunny Isles Beach, FL (population 17,000) in 2010
Finance Director, Surfside, FL (population 5,700) in 2012
Finance Director, Tamarac, FL (population 55,500) in 2005 and 2009
Finance Director, West Palm Beach, FL (population 101,000) in 2007
Manager, Office of Management and Budget, Lake Worth, FL (population 37,000) in 2010
Treasurer, Miami, FL (population (408,000) in 2013

Completed Searches – Housing/Building

Assistant to the County Administrator – Affordable Housing, Broward County, FL (population 1,800,000) in 2004
Building Official, Jupiter Island, FL (population 580) in 2005 and 2010
Building Official, Miami Beach, FL (population 91,000) in 2005
Building Department Director, Osceola County, FL (population 235,000) in 2005
Assistant to the County Administrator – Affordable Housing, Broward County, FL (population 1,800,000) in 2004
Building Official, Jupiter Island, FL (population 580) in 2005 and 2011
Building Official, Miami Beach, FL (population 91,000) in 2005
Building Department Director, Osceola County, FL (population 235,000) in 2005
Building Official, Sewall's Point, FL (population 2,000) in 2006
Building Official, Tamarac (population 55,000) in 2008
Housing and Community Development Director, West Palm Beach, FL (pop. 101,000), 2007

Completed Searches – Human Resources

Human Resources Director, Boca Raton, FL (population 84,000) in 2006
Director of Personnel, Fulton County, GA (population 992,000) in 2010
Human Resources Office, Loudoun County, VA (population 326,000) in 2011
Human Resources Administrator, Martin County, FL (population 140,000) in 2007
Personnel Director, North Miami, FL (population 56,000) in 2001
Human Resources Director, Osceola County, FL (population 235,000) in 2006
Human Resources Director, City of Sarasota, FL (population 55,000) in 2002
Personnel Director, Vero Beach, FL (population 17,900) in 2003
Human Resources Director, Cape Coral, FL (population 154,300) in 2013
Human Resources Director, West Palm Beach, FL (population 101,000) in 2013

Completed Searches – Human Services

Assistant County Administrator for Human Services, Hillsborough County, FL (population 1,000,055) in 2004
Director, Health and Human Services, St. Johns County, FL (population 162,000) in 2010
Executive Director, Juvenile Welfare Board, Pinellas County, FL (population 950,000) in 2005

Completed Searches – Information Technology

Information Technology Director, Lakeland, FL (population 87,000) in 2004
Information Services Director, Lauderdale Lakes, FL (population 32,000) in 1998
Information Services Director, Palm Beach County Tax Collector (population 1,300,000) in 2012 (partial search)

Completed Searches – Parks/Recreation/Libraries

Director, Parks, Recreation, & Conservation, Hillsborough County, FL (pop. 1,000,055) in 2004
District Manager, Holiday Park Recreation District (population 1,400) in 2007
Library Services Director, St. Johns County, FL (population 162,000) in 2007
Director, Parks and Recreation, West Palm Beach, FL (population 101,000) in 2006

Completed Searches – Public Safety

Fire Chief, Cape Coral, FL (population 154,300) in 2013
Fire Chief, Daytona Beach, FL (population 65,000) in 2006
Fire Chief, Lauderdale Lakes, FL (population 32,000) in 1999
Fire Chief, West Palm Beach, FL (population 101,000) in 2005
Executive Director, South Sound 911 (serves a population of 808,000), Tacoma, WA, in 2013
Police Chief, Daytona Beach, FL (population 65,000) in 2006
Police Chief, Golden Beach, FL (population 355) in 2011 (partial search)
Police Chief, Lauderhill, FL (population 66,900) in 2011 (partial search)
Police Chief, Melbourne, FL (population 76,000) in 2011 (partial search)
Police Chief, Sewall's Point, FL (population 2,000) in 2007
Police Chief, St. Augustine Beach, FL (population 6,200) in 2012
Police Chief, Sunny Isles Beach, FL (population 17,000) in 2010

Completed Searches – Public Works

Director, Landscaping, Weston, FL (population 65,300) in 2013
Public Works Director, Chandler, AZ (population 250,000) in 2007
Public Works Director, Fort Lauderdale, FL (population 183,000) in 2004
Executive Director, Environment and Infrastructure, Pinellas County, FL (population 917,000) in 2012
Public Works Director, Polk County, FL (population 500,000) in 2005

Completed Searches – Public Works (continued)

Director / Capital Projects Manager / City Engineer, Sunny Isles Beach, FL (population 17,000) in 2007
Public Works Director, Tamarac, FL (population 55,500) in 2003
Assistant Public Works Director, Sunny Isles Beach, FL (population 17,000) in 2008
Solid Waste Director, Hillsborough County, FL (population 1,000,055) in 2005
Vice President, Public Works & Operations, Ocean Reef Community Association (population 2,000), Key Largo, FL, in 2001

Completed Searches – Transportation

Chief Financial Officer, Hillsborough Area Regional Transit, FL (population 1,000,055) in 2005
Director of Traffic Engineering, Polk County, FL (population 500,000) in 2002
Executive Director, Lakeland Area Mass Transit District, FL (population 87,000) in 2005
Executive Director, Tampa-Hillsborough County Expressway Authority, FL (population 1,000,055) in 2007

Completed Searches – Utilities

Environmental Services Director, Largo, FL (population 74,000) in 2006
Executive Director, Des Moines (IA) Water Works (serves a population of over 500,000) in 2012
Executive Director, Florida Keys Aqueduct Authority, Key West, FL (pop. 90,000) in 2003
Executive Director, Escambia County Utilities Authority, FL (90,000 customers) in 2002
Executive Director, Onslow Water & Sewer Authority (Jacksonville, NC) (pop. 160,000) in 2009
General Manager/CEO, Orlando Utilities Commission, FL (190,000 customers) in 2004
General Manager, Tampa Bay Water (population served 2,400,000) in 2008
Utilities Director, Charlotte County, FL (population 170,000) in 2007
Utilities Director, Daytona Beach, FL (population 65,000) in 2004
Utilities Director, Lake Worth, FL (population 37,000) in 2009
Utilities Director, Palm Bay, FL (population 101,000) in 2005
Executive Director, Environment and Infrastructure, Pinellas County, FL (population 917,000) in 2012
Utilities Director, Polk County, FL (population 500,000) in 2004
Director, South Martin Regional Utilities (population 22,000) in 2013
Water (Wastewater) Resources Director, St. Petersburg, FL (population 248,000) in 2008
Watershed Management (Water and Wastewater) Director, DeKalb County, GA (population 691,900) in 2011 and 2013

Completed Searches – Work Force Management

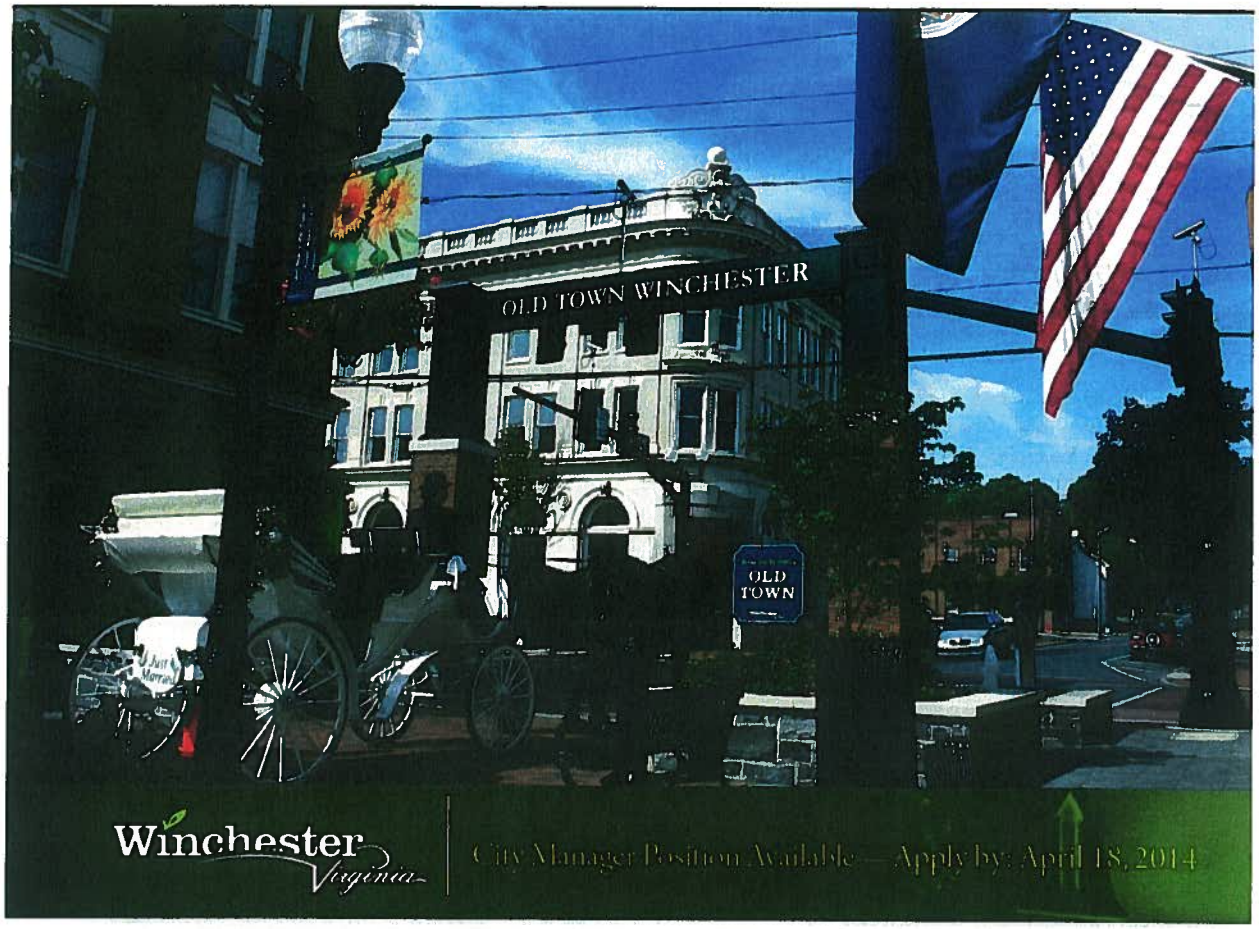
Executive Director, South Florida Workforce, FL (service area pop. of 3,000,000+) in 2005
Director, Office of Economic & Workforce Development, Durham, NC (pop. on 220,000), 2009

Completed Searches – Other

City Clerk, Lauderdale Lakes (population 32,000) in 1998
District Manager, Sun 'n Lake Community Development District, FL, (population 5,000) in 2005
Director, Registrations and Elections, Fulton County, GA (population 992,000) in 2009
Environmental Resources Director, St. Lucie County, FL (population 261,000) in 2009
Executive Director, Lakewood Ranch Inter-District Authority (population 15,000) in 2011
Executive Director, Northern Palm Beach Improvement District, Palm Beach Gardens, FL (population 200,000) in 2003
General Manager, Sun 'n Lake Improvement District, FL (population 7,500) in 2002 and 2005
General Manager, Holiday Park Recreation District, FL (population 4,500) in 2007
Special Projects Coordinator, Islamorada, Village of Islands, FL (population 7,500) in 1998

Appendix B

Sample Brochure:
City Manager Search
Mountlake Terrace, WA



Welcome to historic Winchester, Virginia, home to beautiful scenery, southern charm and a warm, welcoming people. It is a special place – rich in history, well located, big enough to have virtually everything anyone could want, yet small enough not to have many of the problems larger cities have. The City embraces diversity and is seeking an elite-level manager to help the City maintain its quiet historic character while also leading the community into a bright and better future. We invite you to apply!

The City has 9.3 square miles of land within its boundaries and is the county seat of Frederick County. The main thoroughfares through the City that provide the bulk of commercial transportation are I-81 and US-50. The City also has its own general aviation airport that is staffed 24 hours a day, 7 days a week and has U.S. Customs and Immigration Service available with 24-hour notice. It is the official airport of the Virginia Inland Port Authority, which is fifteen miles south of Winchester. The City is also a short 75-mile drive from Washington, DC with all of its attractions, airports, ports and railways. Baltimore with its Inner Harbor and many other attractions is about 25 miles beyond that.

The City has a wealth of attractions for people of all backgrounds and interests. For the cultural enthusiasts, the City has an embarrassment of riches. The Museum of the Shenandoah Valley, designed by the internationally recognized architect Michael Graves, is dedicated to preserving the history of the Shenandoah Valley. It has both a permanent collection and rotating exhibits, the current one being "Becoming Patsy Cline." On the grounds stands the historic Glen Burnie House (a home built in the 1790s and preserved as a monument of colonial culture) and the six-acre Glen Burnie Gardens (a beautiful outdoor collage of

flora and shrubbery designed to invoke the feel of the culture of the 1700s).

Also within Winchester City limits are a plethora of sites from the Revolutionary and Civil War eras that will educate and entertain for hours on end. Stonewall Jackson's Civil War headquarters are located on City grounds, as are George Washington's early surveyor office and the Third Winchester Battlefield. The County operates a Civil War museum in the 1840 Courthouse. Winchester is also the site where George Washington was first elected to public office as a member of the House of Burgesses. In fact, Washington spent much of his time in Winchester from 1748 until 1758.

The recently renovated Old Town pedestrian mall in the City's center offers a wide variety of cuisine and shopping opportunities. Many of the historic buildings have been renovated and include living accommodations on the upper floors, bringing vibrancy to the downtown. On the outskirts are a mall and numerous other shopping and dining venues. The Winchester Little Theatre and Shenandoah University offer regular entertainment, and the Carmike Apple Blossom 12 Cinema is one of the most technologically advanced movie theaters in the country.

The highlight of the spring is Winchester's hosting of the Shenandoah Valley Apple Blossom Festival. This ten day festival is now in its 87th year and will run from April 25th through May 4th of this year. It has over 35 events including, among others, a 10K race, the coronation of Queen Shenandoah, numerous dances and luncheons, a display of new and antique firefighting equipment and a prayer breakfast. The Festival is also notable because it demonstrates the community' commitment to service – volunteers play many key roles in making the Festival a success.

For the outdoor enthusiasts, many jogging, hiking and biking trails are located throughout and around the City. The City's proximity to the Appalachian Mountains and Shenandoah

River, allows for a wide variety of hunting and fishing opportunities. Additionally, Washington, DC with all of its professional sports teams and other activities is a short hour's drive away.

On the practical side of life, Winchester has much to offer. Crime is very low in the City, and citizens regard their community as extremely safe. The cost of living is affordable; a nice home can be purchased for $225,000-$400,000. Medical care in Winchester is exceptional, with the Winchester Medical Center offering numerous impressive services and outstanding physicians. The City also offers a wide variety of religious institutions. It is a place that welcomes business - one where a small business can feel comfortable and grow.

Finally, the City offers solid educational opportunities for youth. John Handley High School offers a high-quality education and many Advanced Placement options. The City is also home to Shenandoah University, an institution of higher education offering a wealth of undergraduate and graduate studies. Just down the road and outside the City limits on Interstate 81 is the campus of Lord Fairfax Community College, which has an excellent relationship with William and Mary and the University of Virginia. It is not uncommon for students to do a year or two at LFCC and then transfer with full credit to these institutions.

All in all, Winchester is simply a great place to be. In fact, AARP recognized Winchester as one of the nation's 10 best places to retire because, it is a "bargain for retirees — and you can't beat the lifestyle." And the same is true for everyone else! The City invites you to join it as its next City Manager.

History

The area's first recorded history traces back to the many Native American tribes that inhabited the area before the advent of the colonization. European arrived as early as the mid 1600's and began to settle in the region. The first explorers were French, but the English quickly established control and populated the area.

Colonel James Wood founded a settlement known as Opequon or Fredericktown no later than 1744. It was later renamed Winchester in honor of his ancestral home in England. It is the oldest Virginia city west of the Blue Ridge Mountains, which define the eastern boundary of the storied Shenandoah Valley.

The City of Winchester, formerly the Town of Winchester, was established by an Act of the Virginia General Assembly passed in 1752.

Thomas Fairfax, 6th Lord Fairfax of Cameron, whose royal proprietary claimed ownership to all 5 million acres lying between the Potomac and Rappahannock rivers, worked with Colonel Wood to extend the town limits in 1758 and 1759. From 1754 to 1763, the area was a hotbed for action during the French and Indian War. In 1779, the Virginia General

Assembly passed an Act wherein the offices of mayor, recorder, alderman, sergeant and councilman were established and their duties and powers defined.

War was destined to play an integral part in the City's development. During the Revolutionary War, area troops led by Colonel Daniel Morgan (known as "Morgan's Sharpshooters") joined General George Washington in the Siege of Boston and played a critical part in the Siege's outcome. Also during the Revolutionary War, area merchants became well known for providing food and supplies to the different armies traversing the region, and local "Apple Pie Ridge" was named in honor of the frequent sale of apple pies on the ridge to both Hessian and American soldiers.

During the Civil War, Winchester reportedly changed hands 72 times, and seven battles were fought in or near Winchester. The City served as headquarters for several Union and Confederate generals, including U.S. General Philip Sheridan in 1864 and C.S.A General Stonewall Jackson (whose headquarters during the winter of 1861-62 have been preserved as a City-owned museum).

On April 2, 1874, Virginia Legislature passed an Act creating the City of Winchester, independent of the surrounding Frederick County, although it still serves as the county seat for Frederick County. In 1905, the City was expanded through annexation by 0.68 square miles to comprise just over one square mile in size. In 1916, Winchester implemented the Council-Manager form of government by hiring its first City Manager.

In 1921, the City was expanded again through annexation by 2.35 square miles to comprise 3.4 square miles. The last annexation occurred on January 1, 1970 after a failed 1969 referendum to consolidate Winchester and the surrounding Frederick County. That annexation added 5.8 square miles to the City. Since then, a combination of voluntary and state-imposed moratoria has precluded any further annexation.

Winchester was the home of polar explorer Richard E. Byrd, three Virginia governors, and the internationally acclaimed country music singing legend Patsy Cline.

In recent years, traditional commercial development has occurred, and the City is currently home to the famed Apple Blossom Mall. The mall has 88 stores and includes well-known names such as Sears, J.C. Penney, and Belk.

Geography

Winchester is the oldest Virginia city west of the Blue Ridge Mountains and is located at the northern entrance of the Shenandoah Valley. The City encompasses 9.3 square miles and is 75 miles west of Washington DC. The topology is hilly, and the City is approximately 725 feet above sea level.

Demographics

Winchester's citizens are slightly younger than the national average. The median age is 35.1 as opposed to 37.2 for the country. Table I shows the City's population distribution by age.

Table I: Population by Age

Age Bracket	Percent
Under 10	13.2 %
10 to 20	13.1 %
20 to 30	17.0 %
30 to 40	15.3 %
40 to 50	12.9 %
50 to 60	12.5 %
60 to 70	8.7 %
70 +	10.3 %

Source: U.S. Census

In terms of race, the population is 74.5% Caucasian, 10.9% African American, 2.3% Asian American, with the remainder of the population being made up of other races or more than one race. Regarding ethnicity, 15.4% of the population is made up of Hispanics of all races.

Per the 2010 census, the median household income was $45,959, while the mean was $65,213. 17.3% of the population had not graduated from high school, 28.8% had a high school degree, 18.1% had finished some college, 5.5% had an Associate's degree, 16.8% had a Bachelor's degree, and 12.8% had completed graduate work. The unemployment rate was 6.4% as of August 2013.

Table II: Climate Data for Winchester, Virginia

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Average High °F	43	47	56	67	75	84	88	87	80	68	58	47	67
Average Low °F	29	31	38	47	57	66	71	70	62	51	41	33	50
Precipitation Inches	2.8	2.6	3.5	3.1	4.0	3.8	3.7	3.0	3.7	3.4	3.2	3.1	39.8

Source: National Oceanic and Atmospheric Administration

Climate

Winchester is classified as a humid subtropical climate with four distinct seasons. Summers are warm and humid and winters are cold with frequent snow. Table II provides more specific data.

Blizzards occur in the region every four to six years, and the annual snowfall is roughly 15.5 inches. The most recent winter was significantly worse.

Commerce

The City of Winchester is the Shenandoah Valley region's center of commercial, industrial, and medical activity, serving a 60-mile radius. Because of the City's position as a regional economic center and its extensive highway system, the City's workforce is drawn from a substantially broader area. Employers in the area offer a wide variety of private sector jobs ranging from agriculture, forestry, and manufacturing to retail, professional, educational, and medical services.

The City's largest employer is the Valley Health Systems, which owns and operates the Winchester Medical Center, five smaller primary care hospitals, and other related services such as urgent care clinics, home health services, a childcare facility, and transport services. A Level II trauma center, the Winchester Medical Center is a non-profit, regional referral hospital serving the tri-state region surrounding the City. The 445-bed facility offers a full range of inpatient and outpatient diagnostic, medical, surgical and rehabilitative services. The Winchester Medical Center recently completed a three-year $161 million construction project enhancing critical care and women's services.

The City's commercial tax base accounts for 40% of the taxable real property value in the City. The City serves as the major retail center for the region. Apple Blossom Mall, an enclosed regional shopping center, contains Sears, Belk, and J.C. Penney as its anchors, along with an additional 85 specialty stores. Nearby plazas house a variety of other retail such as Staples, Books-A-Million, Michael's, Wal-Mart, Lowe's, Home Depot, Target, T.J. Maxx, and Pier 1 Imports.

A table of principal employers is as follows:

Employer	# of Employees
Valley Health System	1000+
Shenandoah University	500-999
Winchester City Public Schools	500-999
Rubbermaid Commercial Products	500-999
Wal-Mart	500-999
US Deptartment of Defense	500-999
City of Winchester	500-999
O' Sullivan Films, Inc	250-499
Grafton Schools, Inc	250-499
Axiom Staffing Group	250-499

Source: 2013 CAFR

Government

Winchester is one of the nation's 41 independent cities (38 of which lie in Virginia). That means while the City is entirely surrounded by Frederick County and in fact is the county seat for the County, no part of the City is part of the County, nor does the County provide any services to or govern any part of the City. The result is that the City must provide

many of the services that would otherwise be provided by the County and operates more as a county than a city.

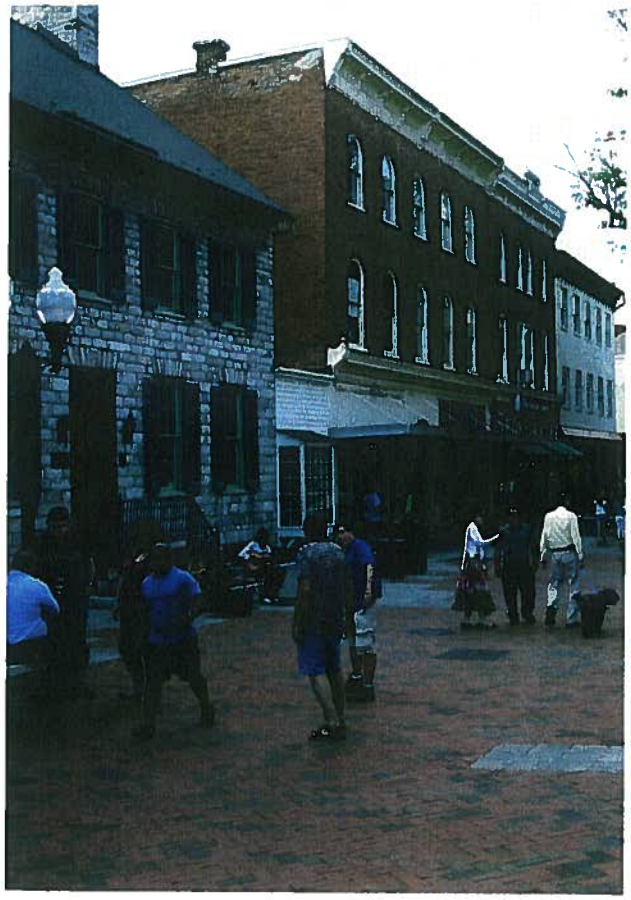
The governing body is composed of nine (9) members elected to staggered four-year terms. Two Council Members are elected from each of the four wards, and the Mayor is elected at large. Elections are held in even-numbered years in November to coincide with the national elections, and one seat from each ward is subject to election. Four of the nine Council Members have terms that expire in 2014. The Mayor's seat will be up for election along with four Council Members in 2016.

The City Council is led by a Council President while the Mayor votes and is the ceremonial head of the government. Although the elections are partisan, the Council Members all put the best interests of the City first. They work well together and respect each other. They can disagree but generally do not. Votes tend to be unanimous, 8 to 1 or 7 to 2. Council Members have difficulty remembering a 5 to 4 vote. The Council Members are fiscally conservative but recognize that good government and infrastructure maintenance cost money. The staff is very strong and the Council recognizes that. While the process to reach a decision can take some time, the Council does want to get things done.

The City is organized under a traditional Council-Manager form of government. Specifically, the City Charter states, "Council and its members shall deal with that portion of the administrative service for which the manager is responsible, solely through the manager, except for purposes of inquiry...All heads of departments under the control of the City Manager... shall receive their instructions and orders entirely from and through him."

The City provides a full range of services, including the following: police and fire protection; emergency response and rescue services; education; water and sewer services; refuse removal and disposal services; the construction and maintenance of highways, streets and infrastructure; parks and recreational activities; cultural events; parking facilities; transit services; social services; planning and zoning; and general administration. The City also funds the School District and the Council appoints its Board Members. The City's General Fund Budget is approximately $80,000,000. The total budget is $208,095,100, of which schools comprise $57 million.

The City has approximately 1,250 employees overall, of which nearly 690 work for the schools. Of the remaining, approximately 225 work for public safety, 70 for the water and sewer utility, 60 for public works, 55 in parks and recreation, 45 in judicial administration, 45 for health and welfare and 40 in general government. The remaining employees are in community development, bus service and the parking authority. There are no unions in Virginia.



Challenges and Opportunities

Winchester weathered the economic downturn reasonably well and continued to invest in its infrastructure. The City is financially strong and has an AAA rating for its General Obligation Bonds. Still, money is tight and the schools always need more funding. All in all, the Council expects money to be managed conservatively, carefully and wisely. It also expects the government to be optimized in terms of efficiency and effectiveness. While no one believes there is waste in the government, the next Manager will want to review operations to see if improvements can be made.

If you visited Winchester five years ago and again today, you would notice a significant difference in the vibrancy of the downtown and the community as a whole. That change has been due in large part to the redevelopment effort – particularly downtown, but in other areas as well. The City is landlocked and raw land is limited, so it is essential that the economic development efforts continue.

While the infrastructure is in generally good condition, investment will need to be made in the stormwater disposal system. The Council would prefer not to levee any new taxes but is considering a stormwater utility and an accompanying assessment so that the issue can be dealt with over the long term.

The City has a strong tradition of strategic planning, and that tradition needs to be continued and enhanced. The Council is specifically interested in enhancing succession planning.

Another challenge will be that the Manager will need to establish him/herself. As the new person to the team, he/she will need to build relationships and understand the city's priorities. That will require a great deal of investment in terms of time getting to know the elected officials, the staff and the community. This job is not one where the Manager can sit behind a desk and direct traffic. Rather, the Council expects the Manager to have a passion for the community, to be in the community and to be invested in the community. The Council is committed to finding someone who will stay as the City Manager for the long term.

The Ideal Candidate

The City is looking for an outstanding leader, someone who will represent the City and will become well known in the community. The individual will be inspirational, dynamic, confident, tenacious, high-energy, extremely positive and very proactive. He/she will have a high degree of integrity and honesty while also being an excellent communicator; that is, someone who listens as well as speaks and is equally comfortable talking to the CEO of a Fortune 500 company and to the person cutting the grass at a park.

The City Council expects to be kept informed, and the Manager should plan on providing the same complete, unfiltered information to all Members of the Council. Part of that duty will include providing not just the information itself, but also the story behind it.

The Council is looking for someone who is flexible and who will partner with them, the City Attorney and other elected officials to achieve what is best for the City and all its residents. Being transparent to the maximum degree possible is important.

The Manager will have a keen appreciation for customer service and lead by example. Residents will know that when they come to City Hall with an issue, though they may not get what they want, the City staff is committed to doing everything possible to help them find a solution.

The next Manager will assist the Council in developing a vision, getting everyone to buy into that vision, and then implementing it. Thus, while the individual will be the City's CEO overseeing the day-to-day operations, he/she will not let it divert his/her attention from the need to plan for the long term or from accomplishing what needs to be done to ensure the City's continued success. The individual will be a strategic thinker and a doer, someone who is creative and business friendly.

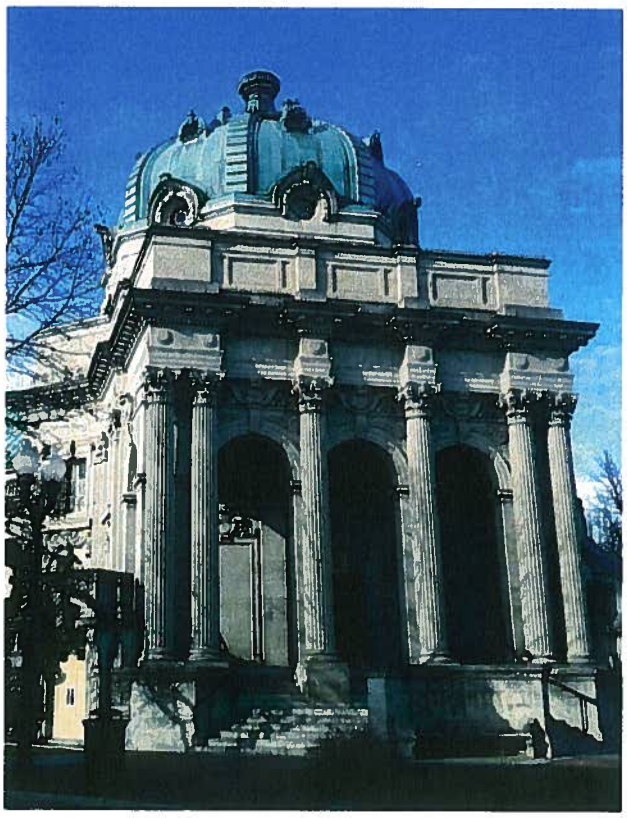
The individual will need strong shoulders and a thick skin but will also be humble and deferential. The next Manager will understand politics but be wise enough not to participate. He/she will have a strong backbone and will be able to diplomatically tell the elected officials what they need to hear, not what they want to hear. Further, the message will be consistent no matter whom he/she

is talking to. The next Manager will recognize the importance of being a buffer between the elected officials and the staff. He/she will also have an outstanding sense of humor.

The City Manager will be a leader who can inspire and mentor the staff. He/she will have high but reasonable expectations and standards. Second-best will not be good enough. He/she will expect results and hold the staff accountable - in an understanding and friendly way. The individual will realize that failure is part of the learning process while also realizing that not every great idea is ultimately successful. As such, he/she will foster a climate wherein creativity can flourish without fear of failure. The City is not looking for a change agent, but rather someone who will recognize and value the existing intellectual property while making changes where appropriate. He/she will build the relationship between the staff, Council and community through communication, trust and integrity.

Winchester has a long and storied history. The City looking for someone who understands the importance of and respects the past and will use it as a foundation for moving forward. The individual will be empathic and understanding of the community and its residents. The City is becoming an increasingly diverse community, so the next Manager will be comfortable with and appreciate diversity. Skill in economic development and building public and private partnerships will be important.

The ideal candidate will have a minimum of ten years of progressively more responsible experience in public or private sector management and at least two years as manager overseeing the efforts of at least 100 employees. A Bachelor's degree from an accredited college or university, with a major in administration, management or a related field, is required. A Master's degree is preferred. Being an ICMA credentialed manager is also desired but not required. A demonstrated track record of achievement is more important.



Finally, the next Manager will see Winchester as a great city, have a passion for it and plan to stay a long time.

Residency

The City Manager is required to reside in the City.

The Past City Manager

The current City Manager will be retiring after a long career in city management.

Compensation

The salary range is $140,000 to $180,000. Benefits are excellent.

Confidentiality

Per Virginia Law, public records of a personal nature may be kept confidential. As such, the City will not release any names without the candidates' prior permission.

How To Apply

E-mail your resume to Recruit42@cb-asso.com by April 18th. Faxed and mailed resumes will not be considered.

Questions should be directed to Colin Baenziger at (561) 707-3537.

Schedule

Candidates will be screened between April 19th and June 2nd. Interviews will be held in mid to late June with a selection shortly thereafter.

Other Important Information

The City of Winchester is an Equal Opportunity Employer and values diversity. It strongly encourages minorities and women to apply. It is also a drug-free, smoke-free workplace.

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

Appendix C

Sample Candidate Report

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING

Sample Candidate Report

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

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Christopher Morrill

Resume

Christopher Paul Morrill

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

Experience

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Other Professional Experience

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

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

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

Education

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

Service

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

Christopher Morrill

CB&A Interview

Christopher Morrill

Education

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

Experience

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

Background

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

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

Interview Comments

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Reason for Wanting to Leave Current Position:

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

Most Recent Base Salary

$150,000 base salary

Adjectives or phrases Mr. Morrill used to describe himself:

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

Interviewer's Impressions

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

Interviewed by:

Tiffany Gremmert
Colin Baenziger & Associates

Christopher Morrill

Background Checks

Background Check Summary for
Christopher P. Morrill

Criminal Records Checks:

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

Civil Records Checks:

County	
Chatham County, GA	No Records Found
Durham County, NC	No Records Found
Federal	
Georgia	No Records Found
North Carolina	No Records Found

Motor Vehicle	
Georgia	No Records Found
Credit	Excellent
Bankruptcy	No Records Found
Education	Confirmed
Employment	Confirmed

Christopher Morrill

Reference Notes

Reference Notes
Christopher Morrill

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

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

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

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

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

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

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

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

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

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

Adjectives or Phrases Used to Describe Mr. Morrill:

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

Strengths: Analytical skills, financial ability and diverse experience.

Weaknesses: None identified.

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

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

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

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

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

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

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

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

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

Adjectives or Phrases Used to Describe Mr. Morrill:

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

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

Weaknesses: None identified.

Reference Notes
Christopher Morrill

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

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

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

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

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

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

Adjectives or Phrases Used to Describe Mr. Morrill:

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

Reference Notes
Christopher Morrill

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

Weaknesses: None identified.

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

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

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

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

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

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

Adjectives or Phrases Used to Describe Mr. Morrill:

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

Strengths: Organization skills and financial background.

Weaknesses: None identified

Reference Notes
Christopher Morrill

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

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

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

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

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

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

Adjectives or Phrases Used to Describe Mr. Morrill:

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

Reference Notes
Christopher Morrill

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

Weaknesses: None identified.

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

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

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

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

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

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

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

Adjectives or Phrases Used to Describe Mr. Morrill:

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

Reference Notes
Christopher Morrill

Strengths: People skills.

Weaknesses: None identified.

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

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

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

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

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

Mr. Morrill would make a very good City Manager.

Adjectives or Phrases Used to Describe Mr. Morrill:

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

Strengths: Financial skills.

Weaknesses: None identified.

Reference Notes
Christopher Morrill

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

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

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

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

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

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

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

Reference Notes
Christopher Morrill

Adjectives or Phrases Used to Describe Mr. Morrill:

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

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

Weaknesses: None identified.

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

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

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

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

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

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

Mr. Morrill is a good presenter. He is comfortable in front of employees, citizens, and the Board.

Reference Notes
Christopher Morrill

Adjectives or Phrases Used to Describe Mr. Morrill:

- Sincere,
- Involved in the community,
- Professional,
- Articulate,
- Genuine, and
- Earnest.

Strengths: Team building, vision, and good management skills.

Weaknesses: None identified.

Jenny Payne, Management Services Coordinator, City of Savannah, GA, (912) 651-6420

Ms. Payne has known Mr. Morrill since 2005. She reports directly to him. He has been a strong leader and is the heart of the organization. He allows his employees to grow without boundaries. He trusts them and encourages them to do their work. He creates an environment in which the staff want to work hard for him and produce their best work. He is a very qualified individual and often acts as the City Manager when that person is absent.

When making a decision Mr. Morrill collaborates with his team to make the best decision for the community. The results may not always be successful based on some traditional measures of achievement, but they do represent the best interests of the whole community. That is his focus.

The City Council respects Mr. Morrill. They seem to respond to him better than they do the City Manager. Mr. Morrill speaks to each of them using their proper title. He understands they are the most important decision making body in the community so he addresses them professionally and with respect.

Mr. Morrill is very responsive. He quickly returns phone calls. He spends time with residents, often listening to their issues when the problem could possibly be handled by someone else. He is sensitive and in tune. When holding a discussion with someone, he will get up away from his desk to sit at a table, without his phone or Blackberry, so they can talk without distractions.

Mr. Morrill often plays the role of mediator. In one instance, some time ago, the Economic Development Authority was having an awards ceremony in a public place. Savannah Gay Pride group was also in the area handing out flyers. Police who were monitoring the ceremony asked the group to leave. Mr. Morrill was called regarding the situation. Although the Police Chief should have been the one to handle the situation, Mr. Morrill understood the political sensitivity needed. He met with the group and the Police Chief to explain and monitor the discussion. He helped the group understand that the police would have asked any group to leave the venue had the situation been reversed. The request of the Police was meant as an attack against their

specific group. He was successful in calming this group. He even arranged for the Economic Development Authority to follow up with the group and express its regrets.

As explained in earlier references, Ms. Payne mentioned his implementation of Budgeting for Outcomes. This new program has led to collaboration across departments. Another project Mr. Morrill facilitated was a 54 acre development of land adjacent to the historical downtown district. As also previously noted, the owners of the land had wanted to create a gated community. Mr. Morrill was able to convince them that sort of development would not be the best use of the property or nor would it be fit well with the historic downtown area. Together they came up with a plan to develop the area for mixed use, including single family homes, the extension of the river walk, retail spaces, and public squares. A tax allocation district was created, and forty percent of the land was donated back to the community. The owners of the property are very happy with the plan and how it will best meet the needs of the community. The project is in development now. The Master Planning for this project received the 2009 Charter Award from the Congress of New Urbanism and the 2009 Excellence in Government Finance Award from the Government Finance Officers Association of the United States and Canada.

Mr. Morrill has been the Chair for the Leadership Savannah Board of Directors since 2007. Leadership Savannah is an organization that sponsors community leadership, networking, and training. Each year a group of thirty people is selected to participate through an application process. The group reflects the diversity of the community and consists of people from every sector. Mr. Morrill is well respected in this arena. He makes it a priority to participate in their events.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Leader,
- Encouraging,
- Team player,
- Genuine,
- In tune with people, and
- The heart of the organization.

Strengths: Leadership skills and people skills.

Weaknesses: None identified.

Robert "Bob" Bartolotta, City Manager, City of Sarasota, FL, (941) 954-4109

Mr. Bartolotta has known Mr. Morrill since 1989. He was the Assistant City Manager in Savannah when Mr. Morrill was the Senior Management Analyst to his office.

Reference Notes
Christopher Morrill

The City has greatly benefited from Mr. Morrill's financial skills. He negotiated a Local Options Sales Tax shares for Savannah along with those of Chatham County, and six other municipalities. He has devised employee incentives measured by productivity, and authored a bonus plan. He is an excellent writer and has published several articles regarding finance. He is a dedicated worker.

Mr. Morrill knows how to simplify complex issues. He can diffuse a heated situation through his patience and calm demeanor. He has a strong moral compass and stands firm in what he believes. He is an advocate for customer service. He has provided training to his staff in customer service. He listens to citizens' complaints and will work with them to solve their problem. He follows up with each citizen to check on the progress of the solution.

Mr. Morrill's communication skills are excellent. He is very talented at talking people through issues and building consensus. He has a excellent vision of the big picture and how to coordinate the efforts of his team.

Mr. Morrill is well prepared to be a City Manger. He manages eleven department heads including Budget, Audit, and Information Systems. He interacts with the Council every day and is well respected by them. He has excellent people skills.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Visionary,
- Consensus builder,
- Focused on people,
- Hard worker,
- Ethical, and
- Excellent writer.

Strengths: Diplomatic skills, people skills, vision, and customer service oriented.

Weaknesses: None identified.

Gregg Schroeder, President, United Way, Savannah, GA, (912) 308-3810

Mr. Schroeder has known Mr. Morrill since 2002. Mr. Morrill is an active member of the United Way Board of Directors. He is very enjoyable to work with because he has a genuine personality.

Mr. Morrill has been a good partner to the United Way. He has been a key player in the success of several projects. One such project involved addressing the need for quality early childhood education. Savannah has a high drop out rate. To combat the problem, the United Way wanted to create a positive educational path for young children through use of a child care center.

The community did not have one. United Way teamed up with a local construction equipment company, JCB Inc. to develop a nationally accredited child care center. Mr. Morrill joined with them as a City representative. JCB and United Way provided the funding for the project, and the City provided the infrastructure for the center. Mr. Morrill shared the same vision as the United Way and used his resources and talents to bring their projects to successful completion.

Mr. Morrill is a key person in the city government. Often staff or citizens will approach him rather than the City Manager. He takes anyone's call and listens sincerely. He is very likable and easy to work with. He has masterminded the financial stability of the City. His implementation of the Budgeting for Outcomes method has been a great success.

In town hall meetings, Mr. Morrill is very good on his feet. He treats others with dignity and respect. He patiently listens to their complaints. Even when Mr. Morrill has to bring bad news to neighborhood associations, he is able to explain the reasons in a manner that helps them understand. He has good rapport with the general public because he responds to their needs.

Mr. Morrill is experienced and well qualified to be a City manager. He is a hard worker and a positive person to be around.

Adjectives or Phrases Used to Describe Mr. Morrill:

- Thorough,
- Accomplished,
- Outcomes focused,
- People oriented,
- Optimistic, and
- Realistic.

Strengths: Team player, vision and dedication to serving the community.

Weaknesses: None identified.

Prepared by: Tiffany Gremmert
Colin Baenziger & Associates

Christopher Morrill

Internet Research

Savannah Morning News (GA)
November 6, 2009

ENMARK, CITY TO TRY FOR COMPROMISE
Author: *LESLEY CONN*

A rezoning request for a planned Enmark station is being delayed two weeks so city officials and Enmark representatives can try to develop a compromise to appease residents dead-set against the station. Poplar Place residents are worried the rezoning will allow Enmark to build a convenience store and pumps at White Bluff Road and Hampstead Avenue, which will further push commercial development into their residential neighborhood.

Several City Council members at Thursday's meeting expressed their support for Enmark, which has promised to build a store that would use subdued colors, low signage and other design elements to better blend with the residential neighborhood. Alderwoman Edna Jackson said she disagreed with City Manager Michael Brown's initial recommendation to deny the rezoning. "That corner has been an eyesore for years," she said. "Anything would be better."

Aldermen Tony Thomas, Van Johnson and Jeff Felser concurred. As council members debated the rezoning, Alderman Clifton Jones repeated and expanded on an allegation from one of the residents. He stated that Ben Farmer, a local real estate agent and member of the Metropolitan Planning Organization, had an agent who had sold the property to Enmark. Alderman Van Johnson called the allegation "very unsettling," and Mayor Otis Johnson directed city staff to investigate the claim. He was uncomfortable that the statement had been made publicly, he said, and said if found untrue, it would be corrected publicly.

Farmer, reached after the meeting, said the claim was untrue. He once had a listing on the property, but it expired with no sale. "We had nothing to do with that transaction. If I had I would have disclosed it." Farmer and Jones spoke late Thursday, and the alderman said he will issue a public apology. "I'm prepared to do that at our next meeting," Jones said.

In other action, the council:

- Did a first read on a revised, proposed ordinance that would require mandatory alcohol server training, registration and permitting. The council had been struggling with how broad the ordinance should be, and after discussion determined it would not expand the requirement to include all hotels, restaurants and other businesses that serve alcohol. Most of the problems with underage drinking center in nightclubs, they agreed, so other establishments would only be forced to comply if they were cited for alcohol-related issues.

- Because of lower sales tax revenues, the city is anticipating receiving $33 million less in special purpose local option sales tax money, which helps fund projects like the Forsyth fort renovation, drainage projects, park improvements and similar work, Assistant City Manager **Chris Morrill** told council during its workshop.

The city had been expecting $160 million, but more likely will receive about $130 million. That will require reviewing the city's list of projects and delaying some of them, **Morrill** said. Council members did a preliminary review of dozens of projects, but will do a more detailed review of projects at its upcoming budget retreat, which is scheduled for Nov. 30.

Morrill also showed council that because of lower revenues, the city is reducing by several million dollars the amount of money it sets aside in its general fund for capital improvements. From 2006 to 2008, the city spent about $5 million. This year, it set aside no money in the fund, and for 2010, plans to set aside $1.6 million. Because of the reduction in funds, the city will concentrate only on needed maintenance projects with those monies.

- The council got an overview of the proposed Historic District Ordinance. Once passed, it will provide specific guidelines for building height, design standards and the approval process for new structures in the district. Brown called the public input and review process "one of the most exhausting" the city has undertaken.

Council will consider the ordinance on first reading at its Nov. 19 meeting.

Savannah Morning News (GA)
September 25, 2009

BEST, WORST OF TIMES
LOCAL ECONOMY 'RIGHT IN SYNC' WITH REST OF STATE, NATION
Author: *ARLINDA SMITH BROADY*

Economic growth in the Savannah Metropolitan Statistical Area, which includes Chatham, Bryan and Effingham counties, significantly slowed in 2008, according to data released Thursday by the U.S. Department of Commerce's Bureau of Economic Analysis.

Out of 366 metropolitan areas, Savannah ranked 144 with a Gross Domestic Product growth rate of 0.2 percent. "These statistics suggest that the Savannah area profile is right in sync with the rest of the state and the nation," said Jeffrey Humphreys, director of the University of Georgia's Selig Center for Economic Growth. "This recession was really tough on the entire region, and recovery will be slow."

The slowdown in economic growth didn't just affect this region, data showed. About 60 percent of metropolitan areas saw economic growth slow down or reverse. Real Gross Domestic Product growth slowed in 220 of the nation's 366 metropolitan statistical areas last year, from 2 percent in 2007 to 0.8 percent in 2008.

Downturns in construction, manufacturing, finance and insurance restrained growth in many metropolitan areas, including Savannah, with government spending showing the most growth.

"No one was really surprised by the data," said **Chris Morrill**, Savannah assistant city manager. "We knew the recession hit us harder and later than a lot of areas." And although it's down from previous years, the city is doing better than the state as a whole, which saw slightly negative growth at -0.6 percent. "We're investing our very limited resources in economic growth and quality of life," **Morrill** said, "and what's a more important quality of life issue than jobs?"

Business in Savannah (GA)
September 16, 2009

CITY PROJECTS WOULD HELP DOWNTOWN MERCHANTS
Author: *ARLINDA SMITH BROADY*

During a meeting of the Downtown Business Association last week, Savannah Assistant City Manager **Chris Morrill** outlined developments designed to help the association's members and others. The first step in unifying economic development efforts was to unify the city logos, **Morrill** said. So the city commissioned a new logo based on the city squares. "It's uniquely Savannah, and it ties all the departments together," **Morrill** said. Another important step, he said, was to grow population. So the city annexed enough land to increase its area by 40 percent. "We were losing population for the past 30 years," **Morrill** said. He compared Savannah's fate to Detroit, where residents moved to the suburbs, causing the city to raise taxes to fight crime and urban blight.

Now, several plans are in the works, including developments around Ellis Square and the fort under construction in Forsyth Park. The Whitaker Street Garage, which lies beneath the square, has been in use since October 2008. To break even for operations and debt service, the garage must make $1.3 million this year, said Sean Brandon, director of the city's Mobility and Parking Department. By the end of July, revenue figures for the Whitaker Street Garage are at $766,000. "We'll probably make our projections," Brandon said. "It's feast or famine. ... Some weekends we clear as much as $10,000, and others the garage is nearly empty."

The above-ground portion promises to be people friendly. "It will be the only square with a building on it," **Morrill** said. There will be a hospitality center and permanent restrooms. One of the most fanciful features is the fountains with 12-foot water jets that can project 260 colors of LED lights. Those fountains can be turned off, and the square is wired to accommodate concerts and other forms of outdoor entertainment. It can hold about 1,000 people and will have tables and chairs instead of benches. "Benches aren't good for interaction," **Morrill** said. "We want this to be a place to gather and be with friends and family."

As for the fort at Forsyth Park, a temporary band shell will accommodate concerts, plays and other events but can be disassembled for everyday use. When the band shell isn't in use, fountains similar to ones at Ellis Square will be in place. "We envision a very family-friendly atmosphere where kids can play and parents can relax," **Morrill** said.

A restaurant leased by the Kessler Group, owner of the Mansion on Forsyth, and "the best bathrooms in town" will be another draw. These projects and others are part of the city's plan to partner with businesses to create a prosperous region. "We need to move away from the mentality that citizens and businesses are customers," **Morrill** said. "We need to work toward partnerships. The way to get out of this recession faster is to build community relationships."

Savannah Morning News (GA)
September 9, 2009

MORE CITY BUDGET CUTS COMING
AS REVENUES FOR 2010 LOOK LOWER, TEAMS OF SAVANNAH CITY EMPLOYEES PROPOSE CUTS TO SERVICES, DEPARTMENTS
Author: *LESLEY CONN*

The city of Savannah is looking at further reducing staff, merging offices and ending some services - decisions that will be made in the coming weeks to trim another $3 million in spending by the end of the year. The bleak prospect for 2010 will further spur spending cuts. City budget analysts already see a $10 million decline in general fund revenue compared to 2009, sales tax revenue remains unpredictable and property assessments that generate the bulk of city income have been ordered frozen until 2011 by the legislature.

One of the more visible city services being evaluated: Ending the Savannah-Chatham police department's mounted patrol unit. Officers would be rotated into patrol cars to fill vacancies. "We're questioning everything," said Assistant City Manager **Chris Morrill**. "If it was just about today, we'd be OK, but the problem is we don't know about revenue for the rest of the year."

A lower city revenue base, he said, is likely going to stay lower for the next 10 years, which will require the city to re-examine its spending. The city already has reduced spending by about $12 million this year to offset lower revenues. That largely has been accomplished by leaving non-essential jobs outside public safety vacant. Nearly 200 of the city's 2,600 positions are unfilled. Bret Bell, the city's director of public information, said the city is continuing to look at eliminating positions, but "we're not looking at mass layoffs."

BUILDING A BUDGET

Many of the spending cuts for the 2009 budget will be implemented immediately and will be handled as part of day-to-day operations. Others, such as a proposal to end the mounted patrol unit, have evolved as teams of city workers participating in a new budgeting process for 2010 evaluate city services. The teams are evaluating services under a variety of umbrellas, such as neighborhood vitality, public safety, health and environment, poverty reduction and economic development. City Manager Michael Brown will use their recommendations to build the city's proposed budget in October. That will be presented to City Council members, who will evaluate the proposal and can mandate changes before approving the budget in a series of public hearings. That, too, shows a lean year ahead. The proposals the teams received for city services totaled $221 million, but the projected revenue available for them equaled $214 million.

LOOKING FOR SAVINGS

Among some of the other cost-saving measures:

- A employee task force created to find savings in city mowing services identified $627,000 in cuts.

Some was achieved by notifying citizens who had "tree lawns" - grassy strips between their street and sidewalk - that the city no longer would trim them. But larger savings were found by not hiring seasonal staff, reducing mowing frequency along streets, cutting back on plantings and using in-house staff to maintain Laurel Grove Cemetery rather than fill a maintenance contract. Small outlying parcels will be contracted out, Bell said, which will cost less than hauling the city equipment as far south as Coffee Bluff to trim a small lot.

- Consolidating fire and police dispatch services by Jan. 1. The primary reason, **Morrill** said, is to improve services, but some cost-savings are anticipated.

- Merging offices and employees.

The Citizen Office, which coordinates public notices to neighborhoods during large city projects and other city initiatives, will merge with the Public Information Office.

Susan Broker, director of the Citizen Office, is filling an administrative position in the city manager's office left open since Sean Brandon, the former assistant to the city manager, became the city's director of mobility services and parking in April 2008.

Three staffers under her will move into Bell's office, and by November, the city no longer will pay rent at an office on Oglethorpe Square.

Annual savings: $15,000 in rent.

"There are talks about doubling up other offices, and even though there may not be a personnel reduction, there are reductions in rent, in office equipment and other resources," Broker said. "Basically, everyone in the city is going through their budget and looking to see what they can do without at least for the next year."

Savannah Morning News (GA)
June 19, 2009

CITY STANDS BY RIVER PROJECT

OFFICIAL SAYS $20 MILLION OBLIGATION FOR SAVANNAH RIVER LANDING STILL A 'GO' DESPITE FLAGGING ECONOMY
Author: *LESLEY CONN, 912-652-0326, lesley.conn@savannahnow.com*

The city of Savannah isn't backing away from its commitment to Savannah River Landing, even as the economy challenges the waterfront development and the city budget. At a City Council workshop session Thursday, Assistant City Manager **Chris Morrill** outlined the $20 million in road, drainage and other improvements the city will undertake. That money will come from revenue collected from a special tax allocation district established around the riverfront development.

Alderman Tony Thomas was the first to question why the city was proceeding during the uncertain economic times, especially given that from a public safety standpoint, President Street and General McIntosh Boulevard have been issues for years. He said he supports the project but added: "This raises a question for me. I've never seen us push an issue this hard."

The improvements, **Morrill** said, are about more than public safety. "Savannah River Landing cannot really have any economic development until we deal with President Street," he said.

Aldermen Van Johnson and Jeff Felser later said they believe the city is sending mixed messages about the development. "It was always my understanding of them as being mutually exclusive projects," Johnson said. "Today I got the impression they are tied together."

Savannah River Landing's developers have invested $60 million in site improvements, Finance Director Dick Evans said, and the $1.4 million in debt service the city is paying annually is still manageable and worth it to honor the private developer's investment.

The mixed-use residential/commercial and retail development has a total estimated price tag of $800 million, and it promises to redefine more than 40 acres of the waterfront just east of the Marriott Savannah Riverfront hotel. As part of the original development agreement for Savannah River Landing, the city had signed off on elevating and widening President and General McIntosh and straightening a section of McIntosh. A second phase of President Street improvements, which include building a bridge over railroad tracks, was not part of the agreement. In trying to secure federal stimulus funds for that phase, city officials emphasized its hurricane evacuation and improved safety features. "I saw no difference in the plan as it was proposed all along," Alderwoman Mary Osborne said. "That's a major development. Nobody's going to walk away from that."

The improvements along President help not only Savannah River Landing but also other planned commercial and residential developments on the south side of the road, Osborne and city officials said.

Should Ambling Cos., the developer, fail to move forward on its investment, City Manager Michael Brown said, the city would have a site with improved roads, drainage, a riverwalk and established water and sewer lines. He and other city officials said they were confident Savannah River Landing would remain viable and were confident vertical construction would begin next year, as company officials have stated.

Savannah River Landing continues to operate from trailers on the site. On Monday, the project plans to unveil a new Web site, said Kate Freeman, the company's marketing and community relations manager.

Sales efforts continue on the residential, commercial and retail front, but she said she could not disclose any information about whether any new commercial or retail clients had been signed up. "The economic times have certainly been a lesson in patience for us," she said. "But we're still committed to the original vision of the project."

Savannah Morning News (GA)
March 27, 2009

SAVANNAH TIGHTENING ITS BELT
COUNCIL TOLD BUDGET COULD BE SHORT BY $9 MILLION
Author: *LESLEY CONN, 912-652-0326, lesley.conn@savannahnow.com*

One out of every 10 city positions is going unfilled as the city of Savannah deals with declining revenues expected to total $9 million. The city has left open 250 positions and by year's end expects to have 330 positions vacant, said **Chris Morrill**, the city's assistant city manager over financial services. Those openings so far have saved the city $1.6 million. A team of city administrators reviews any job positions to determine if it needs to be filled. Only lower-level police and fire department jobs are exempt from review so that public safety needs will continue to be met. The city employs about 2,500 workers. Other teams of employees are examining key aspects of city operations to look for further cost-cutting measures, but city leaders cautioned the City Council on Thursday that the shortfall could be higher than anticipated.

One factor that could change the financial projections is any changes the state legislature may pass regarding property and sales tax collections. "Bottom line, we may need to cut $10 million to $15 million," City Manager Michael Brown said. "I hope it's not $20 (million)." Revenue reports from the first two months of the year show collections down in some key areas, **Morrill** said.

February sales taxes are down $388,000 from the same time in 2008, and hotel/motel taxes for February are down $191,432. Building inspection fees are down $169,113. Some key areas are doing better than expected. Recorder's Court fees were $142,148 above projections, and water and sewer tie-ins - an early indicator of new building - are about $100,000 above projections. In February, the city collected $600,000 in tap-in fees.

Morrill's budget presentation came during a council workshop. During council's regular session, they took the following action:

- Passed a resolution to be sent to the Georgia Department of Transportation restating the city's top priorities for transportation projects. None of the city's priority projects was included in the first round of federal stimulus projects the state selected. Their top item for the second round will be the widening and elevation of President Street, a $36 million project. Council members also asked that local congressmen and groups such as the National League of Cities get a copy as well so they could see that stimulus money was not making its way past Atlanta.

- Asked city staff to return within 60 days with recommendations for instituting a registration and card system for bartenders and servers, as well as stiffer penalties for minors who try to buy alcohol.

- Approved a contract for $1.5 million for curbs, gutters, underground storm drainage and pavement improvements in Fernwood, a neighborhood near Savannah State University. The project has been on the city's to-do list for several years.

- Granted a liquor license to the owners of Sweet Melissa's, 35 Whitaker St. Owner Denise White Pipkin agreed alcohol would be served only to dine-in customers. City officials had been worried customers would be allowed to drink and congregate outside, which would contribute to pedestrian traffic problems at the busy intersection.

Savannah Morning News (GA)
February 25, 2009

CITY PREVIEWS STIMULUS SPENDING
COUNCIL MEMBERS LIST $422 MILLION IN ELIGIBLE PROJECTS, RANGING FROM TRANSPORTATION TO JOB TRAINING AND DAY CARE
Author: *LESLEY CONN, 912-652-0326, lesley.conn@savannahnow.com*

The city of Savannah has identified $422 million in local projects and programs that could be funded under the federal stimulus package.

Entries include $50.7 million for widening and elevating the President Street Extension, $30 million to upgrade Savannah-Chatham police headquarters on Habersham Street, $182,300 for a downtown day care center and $100,000 for an electricians training institute.

Now city leaders have to determine which projects should have the highest priority - and which will have the greatest chance of being deemed worthy by the 13 federal departments that will award funding to competing projects that will pour in from across the nation.

All the projects under review are considered "shovel-ready," meaning work - and the workers who would be hired - would start quickly.

Assistant City Manager **Chris Morrill** said the city was ahead of the game because of its five-year capital improvement planning, which would drive what the city submitted. "It's a shotgun approach," he said. "Those who will be successful will be flexible ... and will be able to mold their project to fit the criteria."

Savannah Morning News (GA)
February 24, 2009

CITY, COUNTY DISPUTE JAIL BILL
SAVANNAH, CHATHAM WORK TO RESOLVE $600,000 IN CHARGES
Author: *ERIC CURL, 912-652-0312, eric.curl@savannahnow.com*

The time it takes Savannah to reimburse Chatham County for costs associated with housing jail inmates has some county officials concerned. City officials say extra time is needed to scrutinize the county's error-filled monthly bills. According to an intergovernmental agreement, Savannah is supposed to pay the county $35 per day for each inmate arrested in the city. Bills are to be sent and paid monthly, but a back and forth between the two governments regarding certain charges has delayed the process. The delays have been a recurring challenge and county officials are trying to speed up payments, said County Manager Russ Abolt. "It's money we feel we're due," Abolt said. Some county commissioners voiced concerns after no reimbursements were received after the first quarter and only a small portion of the amount budgeted had been received after the second quarter, which ended Dec. 31. Abolt attributed the delay to the time the city takes checking the bills. On average, it takes two to three months from the time the Sheriff's Department sends an initial list of jail fees until the final bill is sent, said Linda Cramer, county finance director.

A final bill for August, September and October did not get sent until January, Cramer said. Once the bill is sent, Savannah typically pays in two to three weeks, Cramer said. Savannah paid the county about $1.3 million last year for inmate housing, she said. About $404,000 has been received this year. "When we have an accurate bill, we pay it," said Assistant City Manager **Chris Morrill**. But accuracy is not typically the case, **Morrill** said.

Between 2003 - when the agreement became effective - and 2007, more than $640,000 worth of errors were discovered, Recorders Court Director Prince Johnson said in a memo regarding the issue. An average of 10 percent, or almost $10,700, worth of errors is found each month, Johnson said. Sheriff Al St Lawrence and Jail Administrator Col. McArthur Holmes said there are disagreements regarding certain charges. The city may refuse to pay for a city inmate once another jurisdiction places a hold on that inmate, Holmes said. The city should still pay the bill, he said. The day an inmate is "bound" to the courts is also commonly a matter of dispute. City officials say inmates are often classified as city prisoners when the arrest actually took place in the unincorporated county. The county has no similar complaints from the other municipalities, St Lawrence said. Other municipalities may return their rosters more quickly, but their bills consist of only a small fraction of the bookings reviewed by Savannah, Johnson said. Savannah typically reviews an average of 930 inmates and more than $100,000 in charges, while Garden City was invoiced an average of about $5,600 in charges for the first 10 months of 2008. The county proposed having the city pay an average advance each month to speed up the process. Depending on the actual expense, the city would later be credited or charged. City officials declined. The county should work on fixing the errors before the city should have to pay an incorrect bill, **Morrill** said.

Entrepreneur
August 2008

GFOA's new president-elect and executive board.(Government Finance Officers Association) (Paul A. Macklem, Catherine R. O'Connor,)

The Government Finance Officers Association is governed by an 18-member executive board, which consists of 15 members-at-large serving staggered three-year terms, the current president, the previous year's president, and the president-elect. At the association's annual meeting in June, GFOA members voted for a slate of nominees for president-elect and five new members-at-large, each of whom is profiled below.

[Note: We have included only the information for Christopher Morrill who was appointed as an at-large board member.]

CHRISTOPHER P. MORRILL

Assistant City Manager--Management and Financial Services

City of Savannah, Georgia

Chris Morrill has been a GFOA member for 17 years. He is a member of the GFOA Committee on Economic Development and Capital Planning and also served on the GFOA Committee on Governmental Budgeting and Fiscal Policy from 1994 to 1999. **Morrill** has been an instructor for various GFOA training seminars including Budgeting for Budget Analysts, Capital Budgeting, and Best Practices in Budgeting. He also reviews budgets for the GFOA's Award for Distinguished Budget Presentation Program. He has spoken on issues including economic development at GFOA annual conferences as well as at Florida and Georgia GFOA conferences. He has also written articles for the Government Finance Review.

Morrill shares his expertise internationally He was a municipal finance advisor to the South African National Treasury and a Peace Corps volunteer in public finance in Ukraine. He is a Fellow of the Kellogg National Leadership Program. In Savannah, he instituted annual five-year financial planning and five-year capital planning, reducing the tax millage rate by 27 percent in 10 years.

Savannah Morning News (GA)
July 19, 2008

CITY MULLS HIKE ON TAX REVENUE, RISING FUEL COSTS
GAS PRICES, LOWER REVENUE BEHIND SAVANNAH'S CONSIDERATION AGAINST ROLLING BACK PROPERTY TAX FOR FIRST TIME IN A DECADE
Author: *ERIC CURL, 912-652-0312, eric.curl@savannahnow.com*

High city fuel costs and less consumer spending mean some Savannah property owners will pay more in property taxes this year. City Manager Michael Brown recommended during a City Council workshop Thursday that the board not roll back the property-tax rate as it has done for the past 10 years. "We could reduce it, but there are several reasons not to," Brown said. "We're recommending you stick with what you got at the moment." Maintaining the tax rate at its current level of 12.5 mills - or $12.50 per $1,000 of assessed property value - means the owner of a $125,289 home will pay $19 more than in 2007 due to increased property value, said Assistant City Manager **Chris Morrill**.

Those same property owners would only pay $9 in additional property taxes if the tax rate was rolled back to the recommended level. Savannah officials contend the extra money is needed because the city is facing a projected $1.1 million shortfall in sales-tax revenue and about $800,000 in unexpected fuel costs. Much of the revenue decline comes from a drop in food, automobile, home and lumber sales, **Morrill** said. A larger-than-expected increase in property-tax revenue is enough to cover the difference but only if the tax rate is kept flat.

Commercial and residential properties that are not primary residences could see more of an increase because they're not protected by the Stephens-Day Homestead exemption, which essentially freezes a home's taxable value but factors in consumer price index fluxuations. There have been some positive developments during the year, **Morrill** said. Property-tax revenue is expected to increase 3 percent more than the city originally anticipated, which would bring in an extra $1.9 million. More than 60 percent of the growth in property value, about $228 million, comes from new development as opposed to reassessed values of existing property. "This is the type of growth we want," **Morrill** said. The implementation of energy savings programs in city buildings last year, such as new heating and air-conditioning controls and weatherized buildings, has resulted in a reduced power bill, **Morrill** said. "It's the first time I can remember we are actually spending less on electricity," he said. Hotel and motel tax revenue appears likely to come in even or slightly above the budgeted amount. "Savannah has been amazing the last five years," Brown said. "A lot of these (hotels) are running around with 70, 80 percent occupancy." Still, the tax rate needs to stay where it is to cope with the ongoing "recession," **Morrill** said.

Mayor Otis Johnson said he was concerned Georgia lawmakers could limit the amount of property-tax revenue the city takes in after making unsuccessful tax reform measures this past legislative season. "So I think we have to take a very conservative approach to what we do," Johnson said. "The question is will we ... get caught up in the trend of the day and want to get on the rampart and say we cut taxes. If we cut taxes, what are we going to cut in services?"

Savannah Morning News (GA)
May 1, 2008

LNG NEVER PAID FIRE FEES
SAVANNAH OFFICIALS WANT TO COLLECT MORE THAN $500,000 IN UNPAID BILLS

Author: *SCOTT M. LARSON, 912-652-0397, scott.larson@savannahnow.com*

The El Paso Corp. made more than $1 billion last year, in part from the liquefied natural gas plant it owns on Elba Island. But the company refuses to pay nearly $500,000 the city of Savannah claims the company owes in fire protection fees from the last three years, plus $178,000 due in October. "I can't imagine $178,000 to protect the community that they are located in would be a real financial hardship for the company," said Assistant City Manager **Chris Morrill**.

In fact, in its 30-year existence on the island, the multi-national corporation has never paid for fire protection.

It never has paid for the eight calls to which Savannah Fire & Emergency Services has responded since 2001. But the city still covered the plant, including a freebie on Sept. 24, 2001, to rescue four people working at the site who got trapped in a basket 80 feet in the air. Now, the plant is in the middle of a fire protection controversy. After the city went to the company about the past due bill, El Paso decided to sign a contract with Southside Fire & Emergency Services. "I'm not sure what their thinking is, but I can tell you if they want real fire protection for an industry, the city of Savannah is the only entity that can provide that level of service," **Morrill** said. "So it must be about money."

El Paso spokesman Bill Baerg would only say that Southside is a better fit, although city officials say Southside doesn't have the same capabilities. Fire aside, the plant and others like it are concerns for environmental activists and politicians alike. Area activists argue that the plant poses a serious fire and explosion threat. Liquefied natural gas is a natural gas cooled to minus-260 degrees, but it won't burn in its liquid state. Industry officials say that means it won't explode and level houses for miles as opponents claim. The Elba Island facility opened in 1978 but closed two years later. It re-opened in 2001 and has never had any incident with the 200 ships that have delivered cargo there since.

The U.S. Congress is worried about terrorists attacking liquefied natural gas ships. Last week, the House of Representatives passed a bill requiring the Coast Guard to enforce security zones around arriving tankers. El Paso's Savannah site is approved to nearly double to 15.7 billion cubic feet by 2012.

Savannah Morning News (GA)
March 26, 2008

LOGO UNITES CITY SERVICES
LOCAL DESIGN FIRM CREATES UPDATED BRANDING FOR CITY ON MODEST BUDGET
Author: *EMILY GREEN, For the **Savannah Morning News***

You've probably seen it around town. The subtly scripted "Savannah" prominently placed in black beside a tilted, abstract version of the city's historic green squares. The city of Savannah's new logo is gradually showing up on everything from maintenance vehicles and parking meter receipts to letterhead and envelopes. "It was important that the design be timeless, not trendy, so it would not go out of style," **Morrill** said. "This should be a viable design for decades."

Don't let the simplicity of the logo fool you into thinking it is just another pretty design.

Months of research and proposed sketches by local design firm brightwhitespace, partnered with an identity design committee made up of city employees, went into the production and implementation of the updated logo, now visible all around Savannah.

IDENTITY CRISIS

The plan for rebranding the city of Savannah's image began during a conversation concerning the more than 40 individual logos that represented various service departments. Film Commissioner Jay Self and Assistant City Manager **Chris Morrill** discussed a need for one unifying look to represent the city as a single entity and thus began the initial stages of rebranding.

The many existing department logos were not coherent or recognizable as part of the city of Savannah. Some didn't even represent the intended service to the public, creating potential confusion for citizens wondering which services their tax dollars supported.

"We have thousands of employees, thousands of vehicles out there doing work all day and people don't think about them all being the city of Savannah," Self said.

THEY GET SAVANNAH

The city hired Ariel Janzen and Rigel Crockett of brightwhitespace to work on the project in stages. Their previous experience with identities for the Liberty Parking Shuttle and Tourism and Film Department provided some established trust, but more importantly, the committee chose the local firm because they "get" Savannah.

"There's so much about Savannah that's so subtle," **Morrill** said. "You really have to live here to get it. Having a local company rather than some big national firm come in was important to the process."

From studies and surveys to sketches with various colors, typography and imagery, the two teams collaborated throughout the process.

PLACE BRANDING

"With so much competition for businesses, for visitors, you have to put out a positive image," **Morrill** said. "You have to put out an image that says 'we have our act together.' "

Janzen and Crockett researched other cities with successful rebranding and conducted surveys with Savannah residents, which they used to help compile a list of identity requirements, design specifications and branding goals with the committee.

"As with any identity problem, the challenge was one of perception," Crockett said. "Many city employees did not feel good about their outdated 1950s-style, institutional business cards. Additionally, because each of the city's departments had a unique logo, citizens were not always able to identify which services the city was actually delivering."

WHAT'S IN A NAME

"We realized that the word 'Savannah' itself has a very positive message in it," Self said. "It's a beautiful name to visitors and to locals alike. Instead of minimizing that, the word 'Savannah' is in the center of the logo."

Deciding on an accompanying icon proved more taxing than choosing the main part of the logo. After considering numerous icons, the committee selected one of the city squares tipped on point because of its messages. The committee realized Savannah means different things to different people, however, the one thing unique to the city when compared to others is the public city squares.

"The central core of the Oglethorpe plan and the ward is the square, the open space, the green space, the sense of public," **Morrill** said. "For us it's the simplicity of the symbol and the allusion to the public city squares," Crockett said. "This is important because the square not only represents Savannah's beauty and livability, but it reminds us that the city has always been responsible for their care."

The official design brief explained that the shading of the city square "creates a positive forward motion." The use of green does justice to the countless parks and trees while emphasizing an environmental focus, and the feminine serif font of "Savannah" captures the welcoming spirit. "Even though the symbol is kind of a downtown symbol, those values radiate throughout our community," Self said, "not only in public land planning and public spacing but also with access and involvement."

A SOFT ROLLOUT

The city purposely did not plan an official unveiling of the new logo mainly with the taxpayers' best interest in mind. Instead, it opted for a soft rollout, which means using up supplies that contained the old logos and waiting until vehicles are replaced. From start to finish the rebranding cost totaled just less than $25,000, a cost virtually unheard of in most rebranding projects.

"We wanted to roll it out more organically so that people would subtly discover it," **Morrill** said. "Externally, the whole rebranding as an organization shows that we're one organization, we have core values that we work toward."

Public safety services such as the police and fire departments were not required to switch to the new logo because of their widely recognized existing logos. Appointed city officials such as the mayor and legal counsel will continue to use the more formal historic seal.

Brightwhitespace created a 42-page stylebook with specific guidelines for city employees to use in order to avoid relying on outside vendors for printing. The stylebook contains color variations of the logo in files formatted for Web and print and lists suggestions on how to use the graphics. With city employees having access to the files, they can print on an as-need basis instead of having to order in bulk.

"We thought there would be a lot of push back (internally) because it's difficult to implement change in any organization," Self said. "But to my knowledge it has been universally accepted because we rolled it out in a way for our people that made it as easy as possible for them to embrace it."

Augusta Chronicle, The (GA)
August 20, 2004

PROPOSAL BENEFITS TOURISM GATEWAY
Author: *Scott M. Larson and Mary Carr Mayle, Morris News Service*

SAVANNAH, Ga. - The tourist boulevard along Savannah's quaint River Street will expand soon with the construction of a $570 million mixed-use development that city officials say will transform a chunk of land - next door to downtown Savannah - that resembles a wasteland.

"If you look at it right now as you drive in, it's one of the gateways to Savannah, and it's ugly looking," said Assistant City Manager **Chris Morrill**. "There are not many large sites in the city so close to downtown where you could really do a quality development that could extend the Historic District."

In the past, the site has scared off developers because of extremely poor drainage.

City officials said that, in the past couple of years, six or seven developers have met with the city about the property but couldn't make anything work.

Mr. **Morrill** and John Hutton, the city's acting inspections director, are more optimistic about this proposal because three developers, including a group building a mall just to the south, are working together to address the big issues, such as drainage.

"All of a sudden, you are looking at doing something for one-third of the cost," Mr. Hutton said.

Savannah Morning News (GA)
October 15, 2002

SAVANNAH OFFICIALS TO STAY IN INDONESIA
THREE CITY EMPLOYEES TO CONTINUE GOODWILL VISIT DESPITE VIOLENCE.
Author: ***Savannah Morning News***

Friday, three Savannah city officials departed for Indonesia on a goodwill mission to offer their expertise to a sister city across the globe.

The next day, while the group was in midflight, a bomb exploded in a Bali nightclub.
Sunday, the Savannah trio landed in Indonesia as thousands of Westerners attempted to flee the island nation.

The three - acting Revenue Director Buddy Clay; Development Services Administrator John Hutton; and Public Development Coordinator Cindy Boyette - were given the option of returning, but decided to stay, despite a U.S. embassy order evacuating all nonessential personnel.

The city they are visiting, Yogyakarta, is located on the main island, they reasoned, and they are being accompanied at most times by Indonesian security. As an extra precaution, they have canceled planned media events to lower their visibility.

"They feel safe and they are going to stay," said Assistant City Manager **Chris Morrill**. "If the situation changes, we will get them out quickly." **Morrill**, City Manager Michael Brown and Finance Director Richard Evans visited Yogyakarta in March to establish the sister-city partnership as part of a program funded by the International City/County Managers Association. Hutton, Clay and Boyette will spend the week helping Yogyakarta improve its revenue system and inspections process.

Savannah Morning News (GA)
September 13, 2002

LOST SOLUTION MAY BE FOUND
NEGOTIATORS TENTATIVELY AGREE HOW TO SPLIT ABOUT $45 MILLION A YEAR, BUT THE COUNTY COULD BLOCK THE PLAN TODAY.
Author: *Jennifer Moroz, **Savannah Morning News***

After months of bitter back-and-forth, negotiators for Chatham County and eight municipalities have reached a tentative agreement on how to split up millions of dollars in sales-tax revenue. Under the proposed distribution of the Local Option Sales Tax (LOST), the cash-strapped county would get about $2.3 million a year more than it does under the current arrangement. County Commission Chairman Billy Hair and representatives of the municipalities, including Savannah, agreed the deal was a fair compromise. But some county commissioners say that it does not go far enough, and their voices count: The proposal needs the stamp of the majority on the nine-member commission to become final.

The commission is expected to consider the matter at its regularly scheduled meeting this morning. Pooler Mayor Buddy Carter was confident: "We've got five votes lined up." County Commissioner Frank Murray, one of two designated negotiators for the county, wasn't so certain.

"I don't think it's an offer that has the support to pass," he said.

Murray himself is against the proposal, which was hammered out over the last few days between Hair and Savannah Mayor Floyd Adams Jr. Representatives of the other seven municipalities, which have teamed up with Savannah in the negotiations, have signaled their approval. "I think we're getting close," Murray said, "but I don't feel the offer is where it needs to be right now."

Proceeds from the 1-percent sales tax represent a major source of revenue for local governments, which use the money to fund services - and lessen the property-tax burden on homeowners.
Over the next 10 years, the tax is expected to generate about $500 million. About 35 percent, or $175 million, of that comes from tourist spending. The proceeds are divided based on a number of criteria, including population, level of services provided by each government, and where the tax is generated. The first split is between the county and the municipalities as a group; the municipalities then decide how to divvy up their share. Under the current distribution formula, negotiated in 1995, the county gets 19.22 percent of the annual proceeds - about $8.3 million last year. Savannah gets the bulk at 68.73 percent - about $30 million last year. Over the last three months, county officials have argued that they have lost millions a year as a result of the 1995 deal, when they picked up the cost of housing municipal prisoners in return for a slightly larger piece of the sales-tax pie.

Commissioners, who just finished closing an $11.7 million hole in the county's operations budget, have blamed a large part of the county's ongoing financial woes on the prisoner issue.

Municipal officials countered that the county has overestimated its losses, using faulty figures to calculate prisoner costs.

Under the proposed new agreement, the county would get 17.6 percent of the sales-tax revenue - an amount equal to about $7.9 million next year. It would charge the municipalities $30 a day for each municipal prisoner housed in the county jail. The county would pay for municipal prisoners not yet bound over to the state court system after 28 days.

County officials estimate those prisoner fees will bring in an extra $2.7 million a year. "I think we've come to an agreement we can all live with," said Garden City administrator Tom Gates. "We tried to do what was fair and right and protect the tax to make sure it continues to exist." If an agreement is not finalized by Dec. 30, the tax expires. Up until last week, negotiations appeared deadlocked.

County officials had originally been asking for 18.6 percent of the tax proceeds, plus $45 a day for each municipal prisoner.

City negotiators in return offered the county a 15.51 percent cut of the sales-tax pie, with no help to maintain the county jail.

Savannah Assistant City Manager **Chris Morrill** said the proposed deal was especially sweet for the county. "They started at 18.6 percent and $45 (a day per prisoner) and look where this agreement is," **Morrill** said. "This is a good deal for them." The city, which last year got about $30 million of the proceeds and didn't have to pay to house its prisoners, would lose about $600,000 a year. **Morrill** said he did not yet know how officials would make up the lost revenue.

If county commissioners ratify the agreement, the municipalities would decide how to divide the remainder of the sales-tax proceeds. That division is usually based on population, which would give Savannah 67.37 percent, or about $30.3 million next year. Bloomingdale would get 1.37 percent; Garden City 5.78 percent; Pooler 3.2 percent; Port Wentworth 1.68 percent; Thunderbolt 1.2 percent; Tybee Island 1.74 percent; and Vernonburg .07 percent.

Savannah Morning News (GA)
February 1, 2002

SAVANNAH AGREES TO IMPROVE ACCESS
SETTLEMENT WITH JUSTICE DEPT. COMES ALMOST 2 YEARS AFTER AUDIT FOR COMPLIANCE WITH ADA
Author: *Kate Wiltrout*

Navigating Savannah's streets - and its bureaucracy - will soon get a little easier for disabled people. The city is one of 21 state and local governments that settled Wednesday with the U.S. Department of Justice regarding compliance with the Americans with Disabilities Act. Now almost 10 years old, the act requires that public facilities be made accessible to all people.

Chris Morrill, an assistant Savannah city manager, said the 11-point agreement should take about two years to complete. He estimated it would cost about $300,000, and that money would be found in the budget for the improvements.

Some of the changes are easier than others. For instance, all letters sent from city offices will have a central TTY telephone number on them, so hearing-impaired residents can contact the city.

City Council chambers will be fitted with listening systems for the hard-of-hearing, as will Grayson Stadium and the Martin Luther King Jr. Arena at the Civic Center.

Others are more labor intensive. The city agreed to physical modifications so that "parking, routes into buildings, entrances, doors, elevators, signage, public telephones, restrooms, dressing rooms, locker rooms, service counters, drinking fountains and swimming pools are accessible to people with disabilities."

Carol Bell, Central Services director, said the city would go beyond what's required.

"We don't really have any qualms with the agreement," she said. City Hall will get one wheel-chair accessible bathroom, though it was technically compliant already, with bathrooms in the nearby hospitality center on River Street, said city architect Thomas Perdue.

"God only knows whether the original City Hall even had bathrooms," Perdue said. "The city occupies a lot of buildings that are very historic and very old, and most of those are the ones we have problems with."

Savannah Morning News (GA)
November 13, 2001

NEW ASSISTANT CITY MANAGER ALL OVER THE MAP
Author: *Kate Wiltrout*

Chris Morrill started his job as assistant city manager for management and financial services in August. The position is new to him - but City Hall isn't. Before spending two years in South Africa working for the U.S. Agency for International Development, **Morrill** was Savannah's research and budget director for seven years. That job was interrupted with a two-year Peace Corps gig in Ukraine, where he advised the city of Lviv on finance, management and privatization issues. **Morrill**, who works out of an office in the top corner of City Hall, filled the spot left when Bob Bartolotta moved last October.

Here's what **Morrill** had to say during a break from last week's budget workshops:

What are some of your goals as an assistant city manager?

"First, to ensure that our city employees are well-trained, that they have a good work environment and they have the support services (they need). ... Next is to maintain the city's strong financial foundation, particularly through a possible recession."

He also wants to improve the city's use of technology, both for services and to get information out to citizens. Another top priority is getting citizens more engaged with local government.

How has your work overseas affected your views about local government?

"In the Peace Corps (in Ukraine), I experienced government at its worst, where it's designed to control and keep track of people rather than provide services. It really makes me want to focus on the positive role government can play. In South Africa, post-apartheid, it was seeing that to really have democracy you have to have citizen involvement. It impressed me how diligent they were at that."

How do you think Savannah changed while you were in Africa the past two years?

"I think what I saw coming back was a lot more economic development, downtown and in the neighborhoods. Areas like off East Broad Street that I thought were hopeless have all of a sudden come back. ... I personally have seen a much greater police presence in my own neighborhood (Ardsley Park), and the city seems a bit cleaner."

What can Savannah residents expect if the economy goes into a prolonged recession?
"If the recession is longer term and systemic, then we really need to look at prioritizing the services we provide and actively look at our revenue sources. I think an increase in property tax would probably be a last resort."

Savannah Morning News (GA)
June 8, 2001

SAVANNAH HIRES NEW ASSISTANT CITY MANAGER
Author: *Bret Bell*

Chris Morrill has spent much of the past five years helping to privatize the Ukraine and create a new financial framework for local governments in post-apartheid South Africa.

With that kind of background, City Manager Michael Brown figures he will have little trouble coming up with a budget for little old Savannah. Brown announced Thursday that he hired **Morrill**, who helped create annual budgets for the city of Savannah for the better part of a decade, as assistant city manager for management and financial services.

Considered one of the top three most powerful positions in city government, **Morrill** fills a position that had remained vacant since October, when Bob Bartolotta left to run the city of Jupiter, Fla. Finance Director Richard Evans served as assistant city manager in the interim.

Morrill will start work Aug. 13 with a $98,000 annual salary.

While working for the city from 1990-1992, and again, from 1994-1999, **Morrill** led an eight-member team that prepared and monitored a $170 million budget.

"**Chris** made many improvements in our budget and financial management systems, as well as in the quality and clarity of our presentation and public information materials," Brown said.

In his new position, **Morrill** will oversee 10 city departments, including vehicle maintenance, finance, human resources, purchasing, central services and parking services.

Bartolotta drew some heat from city employees during his tenure when Vehicle Maintenance Department employees claimed abuse and unsafe working conditions. The department's director later resigned during a city investigation.

Some of those worker complaints led to the unionization of service employees earlier this year.

CHRIS MORRILL'S RESUME

WORK HISTORY
1999-present: senior municipal policy adviser for the National Treasury of South Africa -- United States Agency for International Development

1990-1992, 1994-1999: research and budget director, city of Savannah

1997-2000: fellow, Kellogg National Leadership Program -- studied community building in countries throughout the world

1992-1994: Peace Corps volunteer -- advised the city of Lviv, Ukraine, on finance, management and privatization issues

1988-1990: senior management analyst, city of Savannah

1986-1988: senior budget analyst, Catawba County, N.C.

1984-1985: downtown project manager, Lynn, Mass.

EDUCATION

Master of Public Administration, 1987 -- University of North Carolina, Chapel Hill

Bachelor of Arts, 1984, political science major -- College of the Holy Cross, Worcester, Mass.

Certificate in county administration, certificate in budgeting and financial planning -- North Carolina Institute of Government

Columbus Ledger-Enquirer (GA)
October 14, 1996

GEORGIA BRIEFS
Author: *From wire reports*

City to be compensated for Olympic security costs

SAVANNAH -- Savannah will receive $57,308 from the Legislature to compensate for nonpersonnel security costs incurred during Olympic yachting events.

``The request was passed by the state legislature earlier on, and the governor's office gave it final approval late last week," said state Rep. Tom Bordeaux, D-Savannah. ``The city is getting everything it asked for, which is a good sign for Savannah and its planning department."

The money is coming from a $500,000 governor's discretionary grant fund approved by the Legislature so cities hosting satellite Olympic venues -- such as Savannah with yachting or Columbus with softball -- could be compensated for security costs.

Savannah's budget director, **Chris Morrill**, said the money is welcome, even though all Olympic costs are already covered by the city's $88.5 million general fund budget for 1996.

``It's like getting a bonus at work -- you don't go out and spend it right away," **Morrill** said.

ACOG already paid Savannah $290,000 to help defray police overtime in a deal negotiated earlier this year by Mayor Floyd Adams Jr. The city still incurred an additional $244,000 in police overtime during the Games, although all of it was budgeted by city officials.

Savannah requested compensation for computers, police vehicle maintenance, bulletproof vests and extra barricades and other items needed around the venues.

Research Completed by: Vanessa Garner
Colin Baenziger & Associates

Appendix D

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

RESOLUTION 2013 - 59

ORIGINAL

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

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

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

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

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

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

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

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

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

PASSED this 12th day of August, 2013.

JAMES A. RESTUCCI, MAYOR

ATTEST:

DELILAH SAENZ, CMC, CITY CLERK

APPROVED AS TO FORM:

KERR LAW GROUP, LLP
Attorneys for the City of Sunnyside

PROPOSAL TO

CITY OF DUBLIN

FOR

CITY MANAGER EXECUTIVE SEARCH FIRM SERVICES

July 18, 2014

Primary contact:
Gerald E. Newfarmer, President and CEO
1730 Madison Road, Cincinnati, OH 45206
513-861-5400
jnewfarmer@managementpartners.com

Management Partners

Management Partners

July 18, 2014

Ms. Anne Clarke
Clerk of Council
City of Dublin Municipal Building
5200 Emerald Parkway
Dublin, Ohio 43017

Dear Ms. Clarke:

The executive recruitment for a new city manager is one of the most important decisions a City Council can make. The right fit is critical for the elected officials and staff, and can make a significant difference in the achievement of organizational goals. Our rich experience as public sector consultants and former managers gives us unique insight into the skills and qualities that make city managers successful. This helps us identify candidates who would be an outstanding fit for your position, based on thorough research about your needs and community. This perspective, unique among firms that provide local government executive recruitment services, assures that your needs are met.

Our team brings a combination of background and skills vital to meeting the City's requirements. The principal advisor will be Doug Plunkett, with the assistance of Jacquelyn McCray and Sarah Krings, as needed. All three assisted the City of Painesville, City of Brunswick, and Village of Yellow Springs, Ohio in their recent, successful hiring processes for city and village managers. Team member qualifications are included below.

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

Sincerely,

Gerald E. Newfarmer
President and CEO

1730 Madison Road • Cincinnati, OH 45206 • 513 861 5400 • Fax 513 861 3480 managementpartners.com
2107 North First Street, Suite 470 • San Jose, California 95131 • 408 437 5400 • Fax 408 453 6191
3152 Red Hill Avenue, Suite 210 • Costa Mesa, California 92626 • 949 222 1082 • Fax 408 453 6191

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About Management Partners

Management Partners was founded in 1994 with a specific mission to help local government leaders operate their governments in providing high quality service to their public. We are a national consulting firm headquartered in Cincinnati, Ohio. 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 have over 80 associates in the firm and have been conducting executive recruitments for the past 14 years.

Gerald E. Newfarmer, President and CEO is authorized to make representations for and bind the firm. He can be reached in our Cincinnati office (513-861-5400)

In addition to executive selection, Management Partners' services include everything required to support local government leaders, elected or appointed. Our range of services includes the following in addition to executive search:

- Interim Management – Assists government leaders by providing executive staff during transitional periods. Rather than just "keeping the chair warm," our interim managers provide value-added services during their tenure.
- Organizational Analysis– Also called performance audits, efficiency studies and organizational reviews, identifies improvements to an operation's efficiency and effectiveness.
- Performance Management – Encompasses a wide range of management tools that can be and often are developed independently of one another, including: performance management and measurement, process management, performance budgeting, employee performance evaluation and strategic and process benchmarking.
- Process Improvement – Examines the processes by which customers are served, an important technique for developing a program for operations improvement, including process mapping.
- Strategic and Business Planning – Can be an important tool for focusing the efforts of an organization and fostering communication between leaders, staff and important stakeholder groups.
- Financial Planning, Budgeting and Analysis – Assists clients in analyzing their finances and planning for the effective and efficient use of taxpayer or customer dollars.
- Organizational Development and Training – Helps clients develop organizational capacity, a key to developing high performance organizations. Services include executive coaching, customer service training, employee and customer surveys and conflict management workshops.
- Sharing and Consolidation of Services – Offers a more efficient way to provide services, particularly on a regional basis. Options range from the complete integration of previously separate jurisdictions to consolidating the management of individually delivered services.

We are also experienced in facilitation of leaders in public service, having assisted in numerous council/board and management team workshops and meetings. We have designed and led many civic engagement projects of a broader nature, often in conjunction with strategic planning projects.

We offer a balance of perspectives with a practitioner's bias and a proven track record of successful consulting engagements. This experience gives us a sensitivity that produces successful outcomes. The depth and breadth of our perspective will be an invaluable source of assistance to the Council in its selection process.

Our Philosophy About Executive Hiring Support

This proposal offers a proven process that consistently identifies excellent individuals for key positions in a local government. Our work is characterized by the following four qualities:

- *High Ethical Standards.* We conduct each search with integrity, respecting the confidentially of the client's decision-making process and the confidentiality of the candidate's interest in the position, consistent with applicable law.
- *Extensive Depth and Reach.* Management Partners seeks the best professionals for the position by speaking with knowledgeable people to identify superb candidates. We then seek to interest those individuals in considering the position. In addition, we carefully choose online publications, and other media where appropriate, 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 the employment situation in the most positive of terms.
- *Well-planned and Executed Hiring Support.* Management Partners provides advice and support to the City Mayor and Council 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 and the community positively and productively.

Our approach is designed to ensure high quality performance so that you have an excellent pool of candidates from which to choose. The approach is individually planned and executed to make certain 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.

Our Understanding of the Project and Work Plan

Our Understanding of the Project

Our role will be to assist the City Council with developing a process and timeline for the recruitment of a city manager for Dublin. This will include developing a candidate profile; reviewing and recommending a salary range; advertising the position; and directly contacting highly qualified candidates. After soliciting and receiving resumes, we will screen them and then review the initial applicants with the City Council, using a written report on background, strengths, and accomplishments for each candidate; as well as providing reference lists on each recommended finalist. We will then help design the interview process and facilitate the final interviews. As a part of this part of the project, we will coordinate all correspondence, travel arrangements, and recordkeeping; and conduct detailed background and professional reference checks on recommended finalists, if requested. Once a selection has been made, we will assist the City with negotiating a contract.

Proposed Work Plan

The following provides the details of our approach to successfully accomplish this project.

Activity 1: Develop the Profile

Management Partners begins each search by asking the question, "How would you know in a year, or five years from now, that you had hired the right person?" We need to understand both the explicit and implicit standards shared by the organization.

To answer this important question, we will interview each member of the City Council to identify the important qualities and characteristics of the next city manager. We want to understand the culture and the strategic goals that the organization and residents of the community have for the new manager.

Activity 2: Develop a Search Strategy

During this activity, Management Partners identifies how we will contact individuals who could best meet the requirements established in the position profile. We start with the premise that we want to attract the best people in the field, whether or not they are looking for a new job.

The strategy will identify target networks and organizations as well as communication techniques for reaching those who would be outstanding candidates and those who could recommend professionals we should contact for the position. We use a wide variety of sources, including professional association networks, websites and industry publications, resources from past consulting assignments, and networking. As with all of our recruitments, the strategy includes specific organizations and networks for reaching women and minority candidates who would be outstanding candidates for the position.

Activity 3: Conduct an Aggressive Recruitment Campaign

We believe that our consulting work throughout Ohio and the United States, 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. We will place targeted advertisements and electronic postings in appropriate media. And we will make direct, personal contact with those we believe would be a best fit for your position.

Activity 4: Acknowledge Resumes and Screen Prospective Candidates

As your representative to those who engage with us in the recruitment process, we take steps to ensure that your good reputation is preserved by ensuring courtesy and confidentiality in our communications. 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. Internal candidates (current employees) will be screened using the same standards by which external candidates are evaluated.

Activity 5: 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 video conferencing or telephone interviewing when distance constrains 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 will do for finalists.

We use a competitive assessment process which consists of evaluating each candidate against the field in terms of his/her ability to meet the challenges of the position. We will place each individual in one of three groups: (1) those we believe to be best qualified to be successful in the position; (2) those we believe could be successful in the position, but are not as strong as those in the first group; and, (3) the balance of the field.

Activity 6: Identify Finalists

We will meet with the members of the City Council to discuss the array of candidates recommended for further consideration. During the meeting we will review the top professionals, discuss the results of our interviews and determine which individuals you are interested in inviting for interviews.

We will assist the City Council in narrowing 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 strength of their credentials for the position through a contractor who has the technical ability and legal authority to conduct these investigations.

Activity 7: Assist with the Interview and Selection Process

We will design a selection process that reflects City of Dublin values, and offer counsel about techniques that work well and pitfalls to be avoided. For actual interviews, we will prepare appropriate background information about each of the persons to be interviewed, and we will facilitate the interview process as appropriate. This will often include structuring an out-of-town candidate's visit to enable him/her to gain more comfort with the attractions and challenges in your community and to give you a second and deeper chance to examine the candidate.

PROJECT TEAM

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. Participation by qualified minorities on this project team includes two women, one of whom is African American.

Doug Plunkett, Special Advisor, 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. He can be reached in our Cincinnati office or dplunkett@managementpartners.com.

Jacquelyn McCray, Senior Management Advisor, is a well-qualified general management consultant who also maintains expertise as a professional planner and a certified economic development professional. Since joining Management Partners in 1997, she has worked on numerous projects involving development review, organizational and workflow analyses, performance measurement, executive recruitment and strategic benchmarking and planning. Jacquelyn has expertise in process improvement and reengineering of local government development review procedures. She also has excellent interview and facilitation skills, and she frequently conducts employee and stakeholder focus group meetings. Before joining Management Partners, Jacquelyn held positions as a budget analyst, project manager and land-use manager for nine years with the City of Cincinnati. She served as vice chairperson and member of the Cincinnati City Planning Commission for nine years. Jacquelyn is a member of the American Institute of Certified Planners. She can be reached at the Cincinnati office, or at jmccray@managementpartners.com.

Sarah Krings joined Management Partners in November 2012. She graduated from Xavier University in 2009 with a Bachelor of Science in Business Administration. Since joining Management Partners, she has contributed to a variety of projects by analyzing data and assisting with executive recruitments. 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. She can be reached in our Cincinnati office or at skrings@managementparterss.com.

REFERENCES

Management Partners specializes in providing quality professional consulting assistance to local government clients. Our website, www.managementpartners.com, contains information about our clients, and you are welcome to contact any of them about the quality of our work. Below are three references for similar projects within the past 36 months conducted by Doug Plunkett for Management Partners and three he conducted before joining the firm.

Management Partners/Doug Plunkett	**Doug Plunkett**
Paul W. Hach II, President of Council City of Painesville (pop. ~20,000) 7 Richmond Street Painesville, Ohio 44077 440-350-0157 phach@painesville.com	Mayor Kirk Emmert Village of Gambier (pop. ~2,500) 115 Meadow Lane Gambier, Ohio 43022 740-427-2671 mayor@villageofgambier.org
Council member Patricia Hanek City of Brunswick (pop. ~35,000) 4095 Center Road Brunswick, Ohio 44212 330-558-6845 phanek@brunswick.oh.us	Mayor Diana Stockmaster Village of Centerburg (~2,000) 49½ East Main Centerburg, Ohio 43011 740-625-7808 dstockmaster@centerburgoh.org

Management Partners/Doug Plunkett	Doug Plunkett
Council member Brian Housh Village of Yellow Springs (pop. ~3,600) 100 Dayton St. Yellow Springs, Ohio 45387 937-767-9126 brianhoush@vil.yellowsprings.oh.us	Mayor Clifford L. Mason Village of Hebron (pop. ~2,400) 934 West Main Street Hebron, Ohio 43025 740-928-2261 mayor@hebronvillage.com

Members of our team also conducted searches for Hamilton, Ohio (pop. ~63,000) and Indian Hill, Ohio (pop. ~5,800).

Cost and Schedule

We anticipate that the process can be completed in about 90 days from the start of work. At the beginning of the assignment we will collaborate with you to prepare a detailed schedule. Based on the work described above, Management Partners will charge a flat fee of $17,990 for providing these services, including our team's normal direct expenses. This will be billable in three installments, the first at the beginning of the work, the second when the screened list of the candidates is delivered, and the final installment when the successful candidate is appointed. Normal direct expenses included in this fee are printing, background checks, and electronic advertising, as well as travel and lodging expenses for our work associated with the recruitment.

Please note that reimbursement of candidates' expenses, if necessary, to visit the City will be the direct responsibility of the City of Dublin. We will arrange to have these expenses submitted to you for payment.

Work Samples

As requested, we have included a recruitment brochure from a previous recruitment, in this case the City of Brunswick. We have also provided a sample interview book. While they are good representatives of our work, we will create tailored documents for Dublin, based on your needs.

PROPOSAL

CITY MANAGER

EXECUTIVE SEARCH FIRM SERVICES

CITY OF DUBLIN, OHIO

DUE July 18, 2014 at 5:00 p.m.

GovHR USA, LLC

Heidi Voorhees, Co-Owner

650 Dundee Road, Suite 270
Northbrook, IL 60062
TEL: 847-380-3240
FAX: 866/401-3100
July 10, 2014

INTRODUCTION

Thank you for the opportunity to provide you with a proposal for the City of Dublin's City Manager recruitment and selection process. Effective January 1, 2014, Voorhees Associates and GovTempsUSA have combined under one company, GovHR USA. GovHR USA is co-owned by Heidi Voorhees and Joellen Earl. All of the consultants and services remain the same. We are simply combining resources to more effectively serve our clients. GovHR USA prides itself on a tailored, personal approach to executive recruitment and selection, able to adapt to your specific requirements for the position.

QUALIFICATIONS AND EXPERIENCE

GovHR USA is a public management consulting firm serving municipal clients and other public sector entities on a national basis. We work exclusively in the public sector, offering customized executive recruitment services, as well as providing other management studies and services for communities. GovHR USA has been certified as an FBE (Female Business Enterprise) in the State of Illinois.

GovHR USA was established in 2009 as Voorhees Associates, LLC. Our headquarters offices are in Northbrook, Illinois. Heidi Voorhees, President, previously spent 8 years with the nationally recognized public sector consulting firm, The PAR Group and was President of The PAR Group from 2006 – 2009. Ms. Voorhees has conducted more than 190 recruitments in her management consulting career, with many of her clients repeat clients, attesting to the high quality of work performed for them. In addition to her 12 years of executive recruitment and management consulting experience, Ms. Voorhees has 19 years of local government leadership and management service with the Villages of Wilmette and Schaumburg, Illinois, as well as the City of Kansas City, Missouri.

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

Heidi Voorhees, Co-Owner, is authorized to make representation for and to bind the firm. Ms. Voorhees may be reached at 650 Dundee Road, Suite 270, Northbrook, IL 60062. Telephone 847-380-3240. Email hvoorhees@govhrusa.com.

Project Understanding

It is our understanding that the City of Dublin is requesting the services of a qualified executive search firm to assist in the comprehensive recruitment activities associated with identifying and screening outstanding Candidates from which the City Council may appoint a City Manager. These activities are to include position analysis, advertising campaign, résumé review, candidate screening, background investigations, interview process, and negotiation and follow-up.

Experience

GovHR USA has completed 171 recruitments since its establishment in 2009, including 55 for city management positions. We have 16 current recruitments in various stages of completion. Our consultants are experienced executive recruiters who have conducted over 450 recruitments, working with cities, counties, special districts and other governmental entities of all sizes throughout the country. In addition,

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

In the past 36 months, we have completed City Manager/Administrator recruitments for the following communities:

Over 50,000 population:

Fayetteville, NC	123,300	Janesville, WI	63,500
Joliet, IL	147,500	Kalamazoo, MI	75,000
Skokie, IL	65,000	Tinley Park, IL	58,000
Waukesha, WI	70,000		

25,000-50,000 population:

Algonquin, IL	30,000	Burleson, TX	37,000
Burlington, IA	25,700	Carbondale, IL	25,100
DeKalb, IL	45,000	Elmhurst, IL	43,300
Fond du Lac, WI	42,400	Glen Ellyn, IL	27,000
Hanover Park, IL	38,000	Highland Park, IL	31,000
Lombard, IL	43,000	Rock Island, IL	39,000

Under 25,000 population:

Alpena, MI	11,000	Brown Deer, WI	12,000
Caro, MI	4,100	Cary, IL	18,700
East Moline, IL	21,300	Fox Lake, IL	10,500
Ft. Atkinson, WI	12,400	Glencoe, IL	9,000
Hinsdale, IL	16,800	Homer Glen, IL	24,200
Inverness, IL	7,400	Kenilworth, IL	2,500
Lake Villa, IL	8,800	Lincolnshire, IL	8,000
Marengo, IL	7,600	Monmouth, IL	9,500
Morton Grove, IL	23,300	Oakland Township, MI	17,000
Princeton, IL	7,500	Volo, IL	3,400
Washington, IA	7,200	Wauconda, IL	13,600
West Liberty, IA	3,700	Whitewater, WI	14,400

As a former City Manager, Ms. Voorhees is acutely aware of the need to attract women and minorities to local government. She is a founding member of the Legacy Project, dedicated to the advancement of women in local government. She was active in developing and presenting an educational session on Women in City Management at the Illinois City Managers conference and for the 2012 ICMA Conference in Phoenix. Throughout her years of service in local government and as a consultant she has mentored numerous young professionals, including many women and minorities. She is a member of and has forged relationships with the National Forum of Black Public Administrators and she has regular contact with the International Hispanic Network. She is a regular speaker at public administration graduate programs and professional development seminars for young professionals. She has developed a large, national network of women and minorities active in local government and has had considerable success in recruiting women and minority candidates for her assignments.

References

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

City Manager recruitment
City of Highland Park, Illinois
Mayor Nancy Rotering
1707 St. Johns Ave
Highland Park, IL 60035
847-432-0800
nrotering@cityhpil.com

City Manager recruitment
City of Elmhurst, Illinois
Steven Morley, Mayor
209 N. York St.
Elmhurst, IL 60126
630/530-3010

Village Manager recruitment
Village of Glencoe, IL
Lawrence Levin, Village President
L.R. Levin Consulting
803 Sheridan Rd.
Glencoe, IL 60022
847-242-9900
llevin@lrlevin.com

Consultant Assigned

GovHR USA Co-Owner Heidi Voorhees will be responsible for your recruitment and selection process. Ms. Voorhees may be reached at 847-380-3240 (office); 847-902-4110 (cell); or via email at hvoorhees@govhrusa.com.

Heidi J. Voorhees
Co-Owner

Ms. Voorhees has extensive experience in both executive search and general management consulting assignments. She has led more than 140 recruitments for local government entities across the country and takes pride in facilitating a tailored, thorough process that gives elected and appointed officials the tools they need to make critical personnel decisions. Her clients have included the City of Austin, Texas; Johnson County, Kansas; Evanston, Illinois; Waukesha, Wisconsin; Fort Worth, Texas; Bloomington, Illinois; Carbondale, Illinois; Fayetteville, North Carolina; and clients in Arizona, Rhode Island, and Colorado.

In addition to her eleven years of executive recruitment and management consulting experience, she has 19 years of local government leadership and management service, with the Villages of Wilmette and Schaumburg, Illinois, and the City of Kansas City, Missouri.

From 1990 to 2001, Ms. Voorhees served as the Village Manager for Wilmette, Illinois, one of Chicagoland's notable residential suburbs located on the shore of Lake Michigan. During her tenure, Ms. Voorhees focused on delivering high quality services and responsiveness to a recognized interactive community, streamlining administrative and management functions and team building throughout the organization that employed 200 individuals. Under her leadership, the organization developed a collaborative budget process, formalized its long range capital improvement program, and developed budget and financial policies that led to the achievement of a AAA bond rating for the community.

Since leaving the Village of Wilmette in 2001, Ms. Voorhees has been an Adjunct Instructor for the Center for Public Safety located on the campus of Northwestern University. She also instructs law enforcement

executives in the Executive Management Program on management, community relations, and organizational culture. Ms. Voorhees has also been an Instructor for the Northwestern University Master's Degree Program in Public Policy and Administration. She is a frequent speaker on recruitment and selection issues and has conducted training programs for the Illinois City and County Management Association, the Ohio City and County Management Association, the American Public Works Association – Chicago Metro Chapter, the Illinois Association of Municipal Management Assistants, the Northern Illinois University Civic Leadership Program, and the Great Lakes Leadership Academy.

Ms. Voorhees holds a Master's Degree in Public Affairs from the School of Public and Environmental Affairs at Indiana University where she was a fellow in the Eli Lilly State and Local Government Fellowship Program. Ms. Voorhees was recognized as the distinguished Alumnus for the School in 1998. She also has a Bachelor of Science degree in Political Science from Illinois State University.

Ms. Voorhees has served on the Boards of Directors of numerous professional associations including the Chicago Metropolitan Managers' Association and the Illinois City and County Management Association. For two years, she was the Illinois representative to the ICMA University, the professional development arm of the International City and County Management Association. In 1999, she was selected to participate in the Leadership Greater Chicago Program and has been an active Rotarian for 23 years. She is currently on the Board of the Family Service Center for Wilmette, Glenview, Kenilworth and Northbrook, Illinois and the Board of the League of Women Voters of Wilmette, Illinois.

SCOPE OF WORK

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

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

Phase I – Position Assessment, Job Announcement and Brochure Development

Phase I will include the following steps:

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

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

- Development of a **Job Announcement**.

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

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

Phase II – Advertising, Candidate Recruitment and Outreach

Phase II will include the following steps:

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

- The development of a database of potential candidates unique to this position and to the City of Dublin, focusing on the leadership and management skills identified in Phase I as well as size of organization, and experience in addressing challenges and opportunities also outlined in Phase I.

- Outreach will be done through e-mail, telephone contacts, and U.S. mail as appropriate. GovHR USA consultants have extensive knowledge of the municipal government industry and will personally identify and contact potential candidates. With more than 600 collective years of municipal and consulting experience among our consultants, we often have inside knowledge about candidates.

- Our extensive databases and our consultants' years of experience in recruitment enhance our ability to identify individuals who match the criteria outlined in our recruitment brochure and who would be a good fit for Dublin. We are able to contact potential applicants who are not actively seeking a new position but who may be interested in the Dublin opportunity. We have produced successful recruitments for clients who have come to us after other consultants have failed.

Phase III – Candidate Evaluation and Screening

Phase III will include the following steps:

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

  We will develop a matrix which identifies key traits (taken from the Recruitment Brochure) such as education, experience, and the specific skills needed for the City Manager. We will then use these filters to screen the candidates into a group of 15 to 20 semi-finalists.

- Candidates will be interviewed by telephone or Skype to fully grasp their qualifications and experience as well as their interpersonal skills.

  We personally contact all the semi-finalists and conduct about an hour long telephone interview, asking specific questions about their experience and skill set. This allows us to ask follow up questions and probe specific areas. It also provides us with an assessment of their verbal skills and their level of energy for and interest in the position.

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

- All résumés will be acknowledged and contacts and inquiries from candidates will be personally handled by GovHR USA, ensuring Dublin's process is professional and well regarded by all who participate.

Phase IV – Presentation of Recommended Candidates

Phase IV will include the following steps:

- GovHR USA will prepare a **Recruitment Report** that presents the credentials of those candidates most qualified for the position. You will advise us of the number of reports you will need for the individuals involved in this phase of the recruitment and selection process. We provide a binder which contains the candidate's cover letter and résumé. In addition, we prepare a "mini" résumé for each candidate, so that each candidate's credentials are presented in a uniform way. As résumés come in all different formats, these "mini" résumés will give you a clear, consistent look at each candidate "at a glance."

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

- GovHR USA will meet with you to review the Recruitment Report and expand upon the information provided. The report will arrive two to three days in advance of the meeting, giving you the opportunity to fully review it. In addition to the written report, we will spend 2 to 3 hours with you to bring the candidates to "life" by reviewing their telephone interview and providing excerpts from two (2) references we will have done on the individual.

Phase V –Interviewing Process

Phase V will include the following steps:

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

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

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

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

- Once candidates for interview are selected, additional references will be contacted, verification of educational credentials, criminal court, credit, and motor vehicle and records checks. Using the candidate's name and work experience we review the top 200 search results available from Google, as well as his/her activity (if publicly available) on Facebook, Twitter, and other social media platforms. Employment verification can also be provided if so desired.

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

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

Phase VI – Appointment of Candidate

- GovHR USA will assist you as much as you request with the salary and benefit negotiations and drafting of employment agreement, if appropriate.
- GovHR USA will notify all applicants of the final appointment action by the City Council, including professional background information on the successful candidate.
- GovHR USA will provide no-fee telephone follow-up and counsel to the City Council and appointed City Manager for six months following conclusion of the recruitment.

Optional 360° Evaluation

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

Recruitment Schedule

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

Our typical recruitment process includes the following milestones and deliverables:

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

Summary of Costs

Recruitment Fee:	$13,000
Recruitment Expenses: (not to exceed) Expenses include consultant travel, postage/shipping, telephone, support services, copying etc. Also includes candidate due diligence efforts.	5,000
Advertising costs	2,000*
Total Fees:	$20,000**

*Advertising costs over $2,000 will be placed only with client approval. If less than $2,000, Client is billed only for actual cost.
**This fee does not include travel and accommodations for candidates interviewed. Recruitment brochures are produced as electronic files. Printed brochures can be provided, if desired, for an additional cost of $900.

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

Payment for Fees and Services

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

GovHR USA Guarantee

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

Upon appointment of a candidate, GovHR USA provides the following guarantee: should the selected and appointed candidate at the request of the City of Dublin or the employee's own determination, leave the employ of the City of Dublin within the first 24 months of appointment, we will, if desired, conduct another search for the cost of expenses and announcements only.

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

Why Choose GovHR USA?

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

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

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

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

Sincerely,

Heidi Voorhees

Heidi J. Voorhees
Co-Owner
GovHR USA

ACCEPTED BY THE CITY OF DUBLIN, OHIO

BY: _____

TITLE: _____

DATE: _____

GovHR USA

Voorhees Associates GovTempsUSA

Announces a Recruitment For

VILLAGE MANAGER

For THE VILLAGE OF OAK BROOK, ILLINOIS

GovHR USA/Voorhees Associates, LLC is pleased to announce the recruitment and selection process for the next Village Manager for Oak Brook, Illinois. This brochure provides background information on the Village of Oak Brook, the municipal organization and the qualifications and experiences the Village President and Board of Trustees are seeking in the next Village Manager. The current Village Manager has served Oak Brook for the last seven years and is leaving to serve as the Village Manager in a larger community. Candidates interested in applying for the position should submit their résumé and cover letter along with contact information for five work-related references at once to www.govhrusa.com/current-positions/recruitment. Additional information about the Village of Oak Brook can be found on the Village's website: www.oak-brook.org.

Importantly, this brochure will be used as a guide in the open, national recruitment process, providing specific criteria by which all applications will be screened and individuals selected for final interview and appointment consideration. The brochure was prepared after interviews with the Village President and Board of Trustees and Village Department Heads, along with a review of written material regarding the Village of Oak Brook.

All inquiries relating to the recruitment and selection process for the Village Manager position are to be directed to the attention of the Village's recruitment consultant:

Heidi Voorhees, Co-Owner

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

PROFESSIONAL ANNOUNCEMENT

OAK BROOK, IL (7,883) Dynamic, progressive community with beautiful neighborhoods and an expansive commercial, retail and office district, seeks candidates to serve as its next Village Manager. Oak Brook is home to Oak Brook Center, an upscale outdoor regional shopping mall that includes Neiman Marcus, Nordstrom and Macy's as anchors. Oak Brook is also home to numerous nationally recognized restaurants, and corporate headquarters that include the McDonald's corporation, Ace Hardware, Federal Signal and Centerpoint Properties among many others—all of which contribute to Oak Brook's daytime population of more than 90,000 people. Oak Brook residents enjoy excellent schools, beautiful parks and golf courses, a state-of-the-art Library and high quality municipal services. Due to its highly successful business district, the Village does not levy a municipal property tax to support its $52 million total annual budget. The Village is a full-service community that has 135 employees. The Village Manager is appointed by the Village President and Board of Trustees. There have been five Managers since 1990. Candidates must exhibit a high level of professionalism, diplomacy and an expectation of excellence in service delivery. Position requires seven to ten years of increasingly responsible management experience in a community, organization, or business of comparable complexity. A bachelor's degree in public administration, business administration, public policy or related field is required. Master's degree (MPA or MBA) or other advanced degree strongly desired. Candidates must possess excellent interpersonal skills and an approachable, welcoming style with the community, elected officials and staff. Residency is not required. Starting salary range is $155,000 - $165,000+/- DOQ with excellent benefits. E-mail résumé, cover letter, and contact information for five professional references by April 30, 2014 to www.govhrusa.com/current-positions/recruitment to the attention of Heidi Voorhees, GovHRUSA, 650 Dundee Road #270, Northbrook, IL 60062. Tel: 847-380-3243; Fax: 866-401-3100.

COMMUNITY BACKGROUND

The Village of Oak Brook (population 7,883) is located in DuPage County approximately 17 miles west of Chicago's Loop. The Village encompasses about nine (9) square miles, and successfully combines the charm of small town living in one of more than two dozen neighborhoods, with the cultural, recreational, and commercial amenities found in a large metropolitan area.

From the late 1600s to the early 1800s, the area today known as Oak Brook was predominately farm land. In the late 1800s, the area gradually moved from an agricultural settlement to a cluster of small estates. A noteworthy event in this transformation was Frank Osgood Butler's purchase of significant tracts of land along the Salt Creek tributary in 1898. Butler's son, Paul, later become responsible for assembling most of the land which would become Oak Brook. In the mid-1930s, homeowners and farmers formed the Community Club, which helped unincorporated Oak Brook establish an identity separate from its neighboring communities. Meanwhile, Paul Butler continued to accumulate land, with a goal at some point of creating a planned community. On part of his property, he established the multiuse Sports Core, which came to include nationally renowned golf and polo clubs.

Although Oak Brook's residential population is only 7,883, its governmental staff and operations are sized for a much larger community because of its significant commercial sector, numerous retail locations, and corporate headquarters. Given these attractions and convenient highways traveling through the community, Oak Brook has an estimated daytime population in excess of 90,000. Consequently, the Village maintains substantially larger staffing and equipment in its Fire, EMS and Police services in order to protect its residents and visitors.

Planned Community

The founders of Oak Brook developed the community with a goal to achieve a balance in the community. To that end, the Village is roughly divided into three segments: one-third residential; one-third office and retail; and one-third recreation and culture.

Residential. There are more than two dozen subdivisions, ranging from traditional homes to estates, which comprise the housing stock in the community. Nearly all of these subdivisions have active homeowners' associations involved in municipal affairs.

Office and Retail. Located just 30 minutes from downtown Chicago, Oakbrook Center is one of the most prestigious and striking outdoor shopping destinations in the nation. Set amidst lush gardens and flowing fountains, it is the largest open-air premiere shopping center in the country, with six major department stores and over 160 upscale shops and restaurants, and was voted the #1 shopping destination by Illinois shoppers. Oakbrook Center is currently undergoing major renovations, which will occur over a multi-year period. Oak Brook is also home to numerous smaller, upscale shopping centers.

Many national and international companies and organizations have established their headquarters in Oak Brook, including McDonald's Corporation, Ace Hardware, Federal Signal Corporation, Blistex Corporation, Advocate Health Care and SEI Information Technology. The Chamberlain Group recently announced the development of a 252,000 square foot office building that will employ 750 people. Lions Clubs International is also headquartered in the Village.

Recreation and Culture. The residents of the Village are fortunate to have the Oak Brook Sports Core, 269 acres of open green space and sports facilities, in the center of their community. In June of 1977, Oak Brook residents voted to purchase the Sports Core from Paul Butler, founder of the Village. The Sports Core is now owned and operated by the Village of Oak Brook for the benefit of the residents. The Sports Core property includes the Oak Brook Bath & Tennis Club (including swimming, tennis, and banquet facilities), Oak Brook Golf Club (18 hole championship golf course), and the Oak Brook Polo Grounds and open fields—all maintained by the Village. In 2012, the Village was instrumental in bringing polo back to the Polo grounds. A full schedule is planned again for this year. In 2002, a new 24,000 square foot state-of-the-art library was dedicated on the Sports Core property.

Oak Brook is also home to the Butler National Golf Club. The course was designed by Tom Fazio, and hosted the Western Open golf tournament for many years

VILLAGE GOVERNMENT

The Village of Oak Brook operates under the Council-Manager form of government. The Village President and six Trustees are elected at large for four-year staggered terms. The Board sets policy for the Village, adopts ordinances and resolutions, approves the annual budget and the five-year financial plan, as well as approves the monthly expenditures for the Village. A Village Clerk is also elected by the community for a four-year term. Oak Brook operates as a non-home rule community under powers and authority granted by the State of Illinois.

Village of Oak Brook Mission Statement

The mission of the Village of Oak Brook is to provide the community with excellent local government services that meet the needs of its citizens and are delivered in a professional, responsive and responsible manner.

To achieve this mission, the Village will:

- *Strive to deliver high-quality municipal services in a cost-effective and fiscally responsible manner; with courtesy, integrity and fairness; and with a view toward the good of the entire community as well as the individual resident or corporate citizen.*
- *Continually evaluate the content and quality of Village programs and services.*
- *Engage in ongoing planning and development efforts designed to preserve and enhance the value of property in the Village.*
- *Consult with and involve Oak Brook citizens in the Village's decision-making processes through both formal and informal means including hearings, meetings, surveys, advisory boards and commissions, task forces and committees.*
- *Seek to develop a Village staff that emulates, through its values and performance, this mission and its tenets.*

THE POSITION OF VILLAGE MANAGER

The Village Manager in Oak Brook is appointed by the Village President with the consent of the Board of Trustees. The Village Manager is responsible for the day-to-day operations of the Village including the supervision of 135 full-time employees. Department Heads include the Sports Core Director, Community Development Director, Finance Director, Fire Chief, Golf Club Manager, Library Director, Police Chief and Public Works Director. The Village operates and maintains its own water distribution system, with approximately 160 miles of water mains, with substantial overhead and underground storage capacity. The Village is represented by three unions (Police: FOP; Fire: IAFF; Public Works: Local 150). The Village Manager appoints all Department Heads with the exception of the Police Chief, Fire Chief, and Public Works Director, who are appointed by the Village President with consent of the Board.

CHALLENGES AND OPPORTUNITIES

The next Village Manager for Oak Brook can expect to encounter the following challenges and opportunities:

- Manage with accountability a media outreach effort to ensure that Oak Brook's considerable assets are marketed to the Chicago metropolitan area. Oak Brook's excellent schools, low taxes (no municipal property tax), community charm and access to high-end shopping and restaurants make it an attractive community in which to live, work and shop.
- In 2012, the Village was instrumental in bringing back polo to Oak Brook's polo fields. Work closely with senior staff to ensure that this effort is administered as cost effectively as possible.

- As a result of the economic downturn, Oak Brook, like many communities, reduced staff. More than ten percent of the workforce was reduced in 2009. The reduction in staff has not resulted in a significant reduction in municipal services, though several departments have been strained in their ability to maintain service levels. Currently, the Assistant Village Manager position is vacant with those duties being performed by an Interim Assistant Village Manager. The Village does not have a Human Resources Director. The next Village Manager can expect to work closely with the senior staff to review staffing allocations, succession planning and service levels.

- Over the next few years, it is expected that several of the Department Heads will retire. The new Village Manager will have to focus on succession planning to ensure a smooth transition for these key positions.

- The Village is discussing the need to address public facility needs in the police department and in the Village Hall including large electric heating bills and insufficient emergency generator power. The next Village Manager can expect to work with the elected officials and the senior staff on addressing these issues and out-lining funding options. The Village has also committed to address infrastructure and building and grounds issues at the Sports Core.

- Appreciate the challenge of working in an upscale, small town environment of 7,883 residents, with a large daytime population over 90,000. There are over 20 homeowners associations in Oak Brook with whom Village representatives meet throughout the year.

- Numerous projects are planned in Oak Brook over the next few years to improve transportation and beautification. Economic development programs are managed in partnership with the Chamber of Commerce. Oak Brook also has Revitalization and Streetscape Committees.

VILLAGE MANAGER CANDIDATE QUALIFICATION CRITERIA

The following factors of education, experience, management style, and personal traits have been identified by the Village of Oak Brook as ideal attributes for the Village Manager to possess in order to function effectively in the position. The starting salary for the position is $155,000 - $165,000+/- depending upon qualifications and experience. Residency in the Village of Oak Brook is not required.

Education and Experience

(not in order of importance)

Possess a bachelor's degree in public/business administration, public policy, urban management, finance, or related field. A Master's degree in public administration or business administration is strongly preferred.

Have seven to ten years progressively responsible experience and a record of achievement in an organization of similar complexity to Oak Brook, or an equivalent combination of training and experience.

Have demonstrated leadership and management skills specifically engaging members of an executive team in the implementation of goals and objectives. Ensure that analytical and financial analyses are utilized in the evaluation of programs and policies. Engage in creative, critical, analytical thinking regarding ways in which to administer municipal services.

Have experience in intergovernmental relations, maintaining relationships and working with appropriate local, county, state, and federal jurisdictions and agencies in a constructive and cooperative manner; be able to effectively represent the Village's interests to these groups and be an advocate for the Village when appropriate.

Have a proven record of strong administrative leadership skills combined with the ability to work cooperatively and effectively with an engaged, highly educated, and involved citizenry, dedicated elected officials and volunteers, as well as skilled and experienced department heads.

Have the experience to effectively translate Village Board direction promptly, accurately, and supportively to staff, ensuring timely implementation of policy direction; hold staff accountable for project assignments.

Have experience managing the broad range of municipal services, including familiarity and understanding of recreation management and library services.

Have a demonstrated record of effective public presentations, including outstanding communication (oral and written) skills, together with a track record of successfully resolving citizen complaints; provide timely response and follow up to phone calls and emails.

Have demonstrated financial management and budgeting skills with a record of developing fiscally conservative and forward-thinking programs; have experience in infrastructure financing and the development of priorities for capital improvement programming, including expertise in financing options for long-term projects; be aggressive in exploring alternative revenue sources. Understand and embrace the community's philosophy of not levying a municipal property tax.

Be familiar with long-range capital improvement programming, operational reviews, performance measurements, and revenue forecasting; be committed to the efficiency and effectiveness of local government programs; and, be creative and innovative with respect to the review of government programs, services and staffing levels in the organization.

Be skilled in public and media relations, capable of openly and honestly articulating the Village's municipal policy position to residents and the media, community groups and organizations; appreciate the need for regular and prompt communication of information to these groups; follow a policy of full disclosure in public presentations; have an attitude of complete transparency with respect to local government operations.

Have successful personnel management and labor relations experience including performance evaluation, contract negotiation and arbitration, grievance processes and promotion and discipline in a unionized environment, with a record for fairness in dealing with all employees; become personally acquainted with Village employees. Be comfortable advocating for employees when appropriate.

Be capable of attracting, developing and retaining a highly qualified professional staff and workforce, maintaining a strong team management approach in municipal services delivery and administration of municipal programs and activities.

Management Style and Personal Traits

(not in order of importance)

Have the maturity, self-confidence, and strength of professional convictions to provide administrative insights, counsel and recommendations to the Village President, Village Board and staff; be able to firmly and diplomatically present professional views and carry out administrative decisions in a timely, professional, and impartial manner.

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

Possess leadership, communication, and interpersonal skills required to provide guidance to Staff, Trustees, and other interested parties in seeking resolution of complex community issues that result in win/win results, thereby promoting unity within the Village rather than creating divisiveness.

Seek staff input on issues; be a "macro" manager—give Department Heads latitude to carry out their work and provide overall support of their mission. Encourage innovative thinking by the staff.

Possess particularly strong management skills that focus on staff development (a "team builder"), effective delegation and accountability for the timely implementation of Village Board decisions; remain informed and conversant on the status of all programs and projects; be able to serve as the Village Board's point person when appropriate.

Have expertise in seeking out innovative and creative solutions to issues facing the community and the municipal organization; be willing to undertake calculated risks when implementing creative solutions. Ensure that solutions include a strong fiscal analysis.

Be a self-starter who has the vitality and energy to motivate and lead others; be someone who seeks and enjoys a challenge; be completely comfortable taking on projects and being a "working manager."

Be a mature, self-confident, diplomatic individual, with a calm, even temperament; maintain composure when under fire.

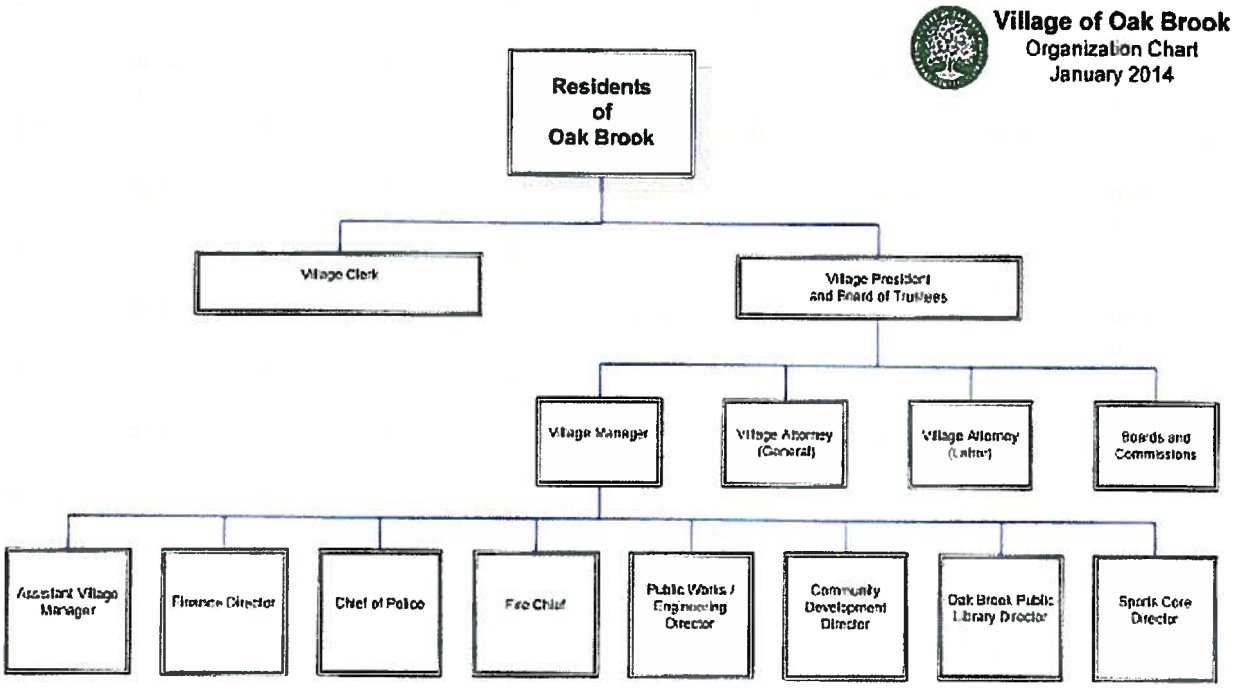
Project a strong professional presence in appearance, actions, and personal demeanor; be politically astute; be completely non-political and nonpartisan in behavior and actions. Be enthusiastic about participating and being active in community affairs.

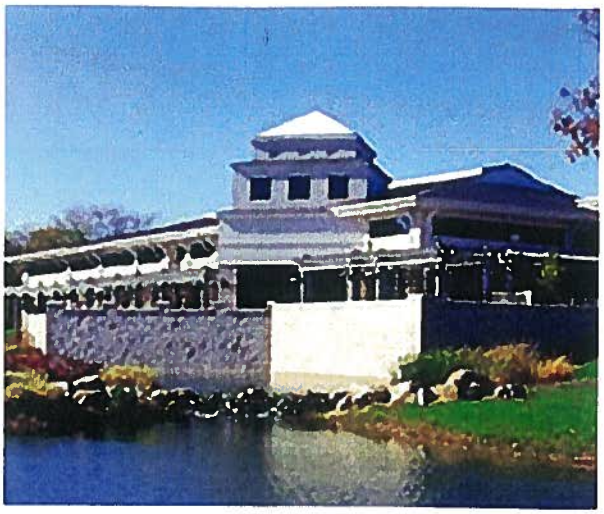
Be a "people person" —a good listener, sincerely personable, patient, and accessible, and one who can relate with all persons in the community; be committed to a "true" open door policy.

Be well organized and efficient, paying attention to detail, as well as having a "big picture" approach. Be comfortable in managing multiple priority projects simultaneously.

Be willing to commit to a reasonable tenure in service to the Village of Oak Brook.

Have a sense of humor.

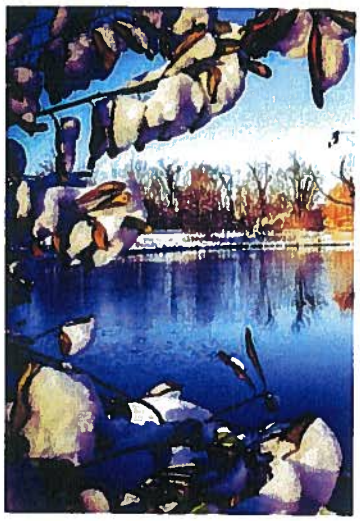

Village of Oak Brook
Organization Chart
January 2014
Residents of Oak Brook
Village Clerk
Village President and Board of Trustees
Village Manager
Village Attorney (General)
Village Attorney (Labor)
Boards and Commissions
Assistant Village Manager
Finance Director
Chief of Police
Fire Chief
Public Works / Engineering Director
Community Development Director
Oak Brook Public Library Director
Sports Core Director



Proposal to Provide Recruitment Services
for the position of

City Manager

For the City of Dublin, Ohio



Submitted July 16, 2014

Prepared by Ralph Andersen & Associates

Contact: Heather Renschler
5800 Stanford Ranch Road, Suite 410
Rocklin, California 95765
916.630.4900
www.ralphandersen.com

Ralph Andersen & Associates
A Tradition of Excellence Since 1972

5800 Stanford Ranch Road
Suite 410
Rocklin, California 95765
916.630.4900

July 16, 2014

Mayor Michael Keenan
and Members of the City Council
City of Dublin
Municipal Building
5200 Emerald Parkway
Dublin, Ohio 43017

Dear Mayor Keenan and Members of the City Council:

Ralph Andersen & Associates is pleased to submit our proposal to provide executive search services for the City of Dublin. We look forward to working with your community to recruit for this important position.

For this assignment, I will be the Project Director. ***As a native of Northwestern Ohio and with family members in the near-by area (Columbus), I will personally handle this search effort.*** I believe the search for the City of Dublin will be well served with under my leadership. Additionally, with a national reputation for high professional ethics and integrity, the firm of Ralph Andersen & Associates will bring tremendous outreach capabilities to this outstanding career opportunity – both regionally and nationally. Our mission and commitment to the City of Dublin will be to provide the highest quality of search services. Also, and critically important, we are also very familiar with the State of Ohio's very stringent public record laws.

A sample recruitment brochure for the recruitment (completed in 2011) for the City of Upper Arlington (Placement: Ted Stanton, City Manager) has been included for your reference. For Upper Arlington, I was the Project Director and lead consultant dealing directly with the City Council. Although on a much larger scale, the current search for City of Cincinnati's City Manager is also being handled by our firm and is in the final stages of the selection process. Another member of the firm is conducting the City of Cincinnati search effort. Again, this demonstrates the depth of our organization and the broad range of recruitment services we offer to municipalities of all sizes.

The City's timing to interview search consultants and kick-off a recruitment are an excellent match with upcoming personal travel and vacation plans. Important to note, I am anticipating arriving in Ohio on July 30 or 31 and staying through at least August 11 or 12. If appropriate, I would be available for a presentation to the City Council during this timeframe. In fact, with family in the Columbus area, I hope to also attend the Dublin Irish Festival and may also be visiting a golf course or two with my spouse before heading to Northwestern Ohio.

Thank you very much for your consideration of this proposal. I look forward to your favorable consideration. Should you need any clarification, please feel free to contact me at my office (916/630-4900) or via cell phone (916/804-2885).

Respectfully Submitted,

Heather Renschler

Heather Renschler
President/CEO

Ralph Andersen & Associates
A Tradition of Excellence Since 1972

5800 Stanford Ranch Road
Suite 410
Rocklin, California 95765
916.630.4900

Proposal to Provide Executive Search Services for the position of City Manager City of Dublin

Executive Summary

Attracting top talent has never been more complex and Ralph Andersen & Associates is highly qualified to assist the City of Dublin with recruiting its new City Manager. We have conducted more successful executive recruitments than any other firm since 1972. From helping you to create a competency-based interviewing framework for your new City Manager to assessing candidates and attracting top human capital, our search professionals offer an unparalleled depth of experience, national reach, and industry knowledge.

The City has requested our proposal to assist in the identification and recruitment of a highly qualified group of candidates for the new City Manager. In particular, the City of Dublin is seeking a firm with the national reach and professional experience to clearly assess your organizational needs and formulate a strategy to ***deliver results.***

At Ralph Andersen & Associates, we believe that gaining a complete understanding of our client's specific objectives and priorities is essential prior to launching any search assignment. This process includes the identification and incorporation of a variety of important details such as the candidate's desired skills and experience as well as the critical "soft skills" related to temperament, personality, management philosophy, and other factors that will ultimately determine the candidate's "fit" with the organization.

We therefore begin each search by working closely with your leadership, stakeholders, staff, and when appropriate, your community to ensure a complete picture of the desired candidate pool is developed. Our team-oriented approach matched with this 360 degree perspective means we ensure that a complete understanding of the organization's mission and culture translates into those specific traits and characteristics necessary to ensure the selected candidate is successful in the position.

We understand that the Mayor expects aggressive, personalized outreach to identify a diverse and highly qualified applicant pool and a selection process that includes comprehensive candidate reports based on thorough reference and background checks. We will begin with fully detailed profiles of the desired candidate's characteristics and build a recruitment strategy that is tailored to meet the City of Dublin's specific needs. The resulting outreach and advertising campaign will in-

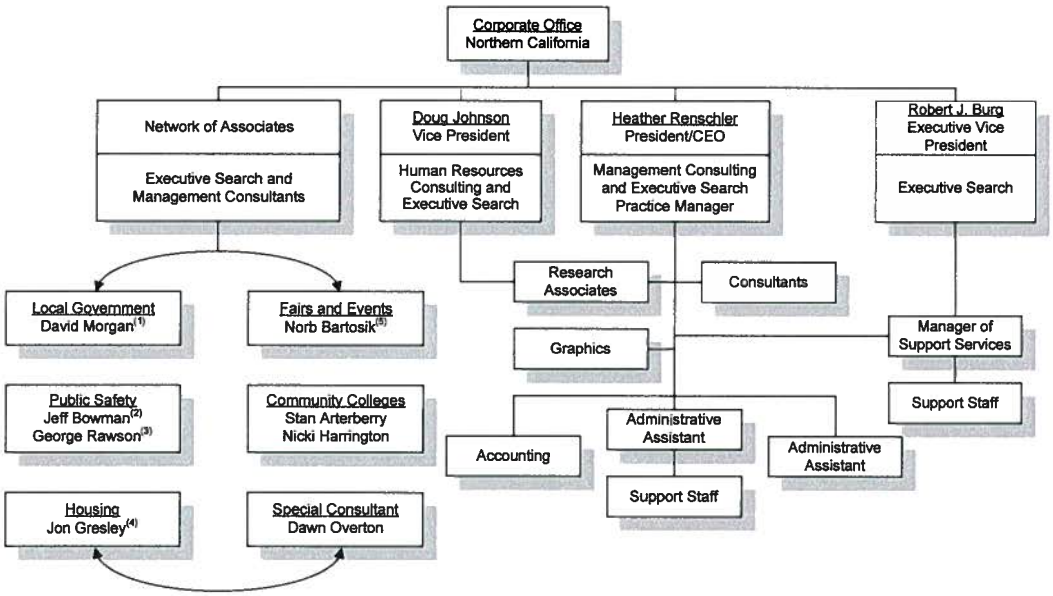
corporate the extensive use of personal outreach to recruit a diverse and highly qualified group of candidates.

History of the Firm

Ralph Andersen & Associates, a California Corporation, has been providing executive search and management consulting services on a national scale since 1972. As one of the first in the nation to work exclusively in the public sector, Ralph Andersen & Associates has been conducting City Manager recruitments for more than 42 years. The Corporate Office of Ralph Andersen & Associates is located in the Sacramento Area at 5800 Stanford Ranch Road, Suite 410, Rocklin, California 95765.

Ralph Andersen & Associates is a California Corporation and is not a subsidiary nor does it have any subsidiaries. Ralph Andersen & Associates currently has 14 employees.

Ralph Andersen & Associates



(1)Experienced City Manager
(2)Former Fire Chief
(3)Former Police Chief
(4)Former Housing Executive
(5)Former Fair CEO

Updated May 2014

With Ralph Andersen & Associates, there is an entire team behind every recruitment. Our firm takes a multi-disciplined, team approach to executive search. Successful outreach relies heavily on person-to-person contact to identify outstanding potential candidates and, in the evaluation phase, to gain a complete understanding of the background, experience, and management style of the top candidates. By drawing on the combined expertise of our associates and our network of professional contacts, we address outreach from a wide variety of perspectives and find unique ways to identify and recruit the best and brightest.

Ralph Andersen & Associates serves a nationwide clientele through its Corporate Office in Sacramento, California. Clients served are on a national basis and the firm is currently working on projects of national significance and importance across the United States. A multi-disciplined, full-service local government consulting organization, Ralph Andersen & Associates is dedicated to helping our clients improve operating efficiency and organizational effectiveness.

Our national staff of professionals and support staff include acknowledged leaders in their respective fields. Supplementing their extensive consulting backgrounds, our senior staff all have personal, hands-on executive experience in the operation of public agencies and private businesses.

The principals of the firm are Heather Renschler, President/CEO, and Robert Burg, Executive Vice President. Both Ms. Renschler and Mr. Burg are legally able to bind the firm. Ms. Renschler and Mr. Burg can be reached as follows:

- Ms. Heather Renschler, (916) 630-4900 (office); (916) 804-2885 (cell), or via email at heather@ralphandersen.com

- Mr. Robert Burg, (916) 630-4900 (office); (805) 264-2663 (cell), or via email at robert@ralphandersen.com

Range of Services Offered – Ralph Andersen & Associates specializes in the following primary service areas: management consulting, human resources consulting, public safety, and executive search.

- **Management Consulting** – Ralph Andersen & Associates helps organizations improve their performance potential with a range of management consulting services. The types of services provided by the firm include management and performance audits, organizational analyses, productivity improvement analyses, agency and service consolidation assessment, specialized financial management including debt restructuring and organizational problem solving. In addition to providing these services to entire organizations, the firm often conducts management consulting engagements that are focused in a specific service area such as public safety, city management, finance, public works, community development and other major service areas. Ralph Andersen & Associates treats every management consulting engagement as unique. This approach means we will assemble a consulting team comprised of consultants with the specific talents and experiences needed to successfully achieve the client's objectives. Our team of experienced consultants perform complex analyses and recommend solutions that are practical and most importantly, are capable of being implemented by our clients.

- **Human Resources Consulting** – The firm provides a full range of contemporary human resources consulting including classification studies, compensation studies, benefits analysis, pay plan development, executive pay, and pay for performance. Key staff have proven success in working with labor groups and elected officials in identifying solutions and solving challenging problems. Services also include expert witness services for mediation and arbitration hearings. Our approach to consulting services is characterized by proven methods, extensive data collection, accurate analysis, and effective communication and messaging.

- **Public Safety** – Working closely with our clients to implement innovative emergency management solutions, Ralph Andersen & Associates helps organizations plan, protect and serve people better than ever before. We bring together practical solutions, plans, and processes that are operationally deployable to help our clients achieve their critical objectives. The firm's consultants have extensive, hands-on experience in planning and disaster preparedness training for private and public institutions including healthcare, public health, human services, and local, state and federal government agencies.

- **Executive Search** – At Ralph Andersen & Associates, there's always an entire team behind every recruitment assignment that we undertake. Our multi-disciplinary approach takes the best ideas in executive recruiting and creates innovative ways to get the right candidates for clients. When you retain Ralph Andersen & Associates, you actually get an

entire team's worth of support and expertise working together to achieve your organization's objectives. The firm has conducted executive searches for large and small organizations throughout the nation. In addition to conducting searches for city manager and other chief executive officer positions, Ralph Andersen & Associates has successfully completed searches in every area of municipal service. Ralph Andersen & Associates believes the most important element of a successful executive search is to listen carefully to what our clients are looking for in terms of candidate experience and qualifications. Using these client-focused guidelines, candidate identification is undertaken through marketing and personal outreach.

Project Staffing

The reputation of the search firm and personal commitment of the recruiters define the difference between the success and failure of any given recruitment. Ralph Andersen & Associates' search professionals are acknowledged leaders in the field and possess a broad range of skills and experience in the areas of local government management, executive search, and related disciplines. Only senior members of Ralph Andersen & Associates are assigned to lead search assignments, ensuring that their broad experience and knowledge of the industry is brought to bear on our clients' behalf.

Ms. Heather Renschler will be the lead consultant and primary contact with the City of Dublin on this recruitment and can be contacted through the corporate office (916/630-4900), via her cell phone (916/804-2885) or email (heather@ralphandersen.com) and will respond to requests from the City in a timely manner. Biographical information about Ms. Renschler and related search assignments begins on Page 7.

Paraprofessional and Support Staff will provide administrative support to the Project Director on recruitment assignments. These staff include: Ms. Brianna Ham, Ms. Diana Haussmann, Ms. Teresa Heple, Ms. Tiffany Taylor, and Ms. Hillari Bynum.

Summary of Our Search Process

The successful search process relies heavily on person-to-person contact to identify outstanding potential candidates and, in the evaluation phase, to gain a complete understanding of the background, experience, and management style of the top candidates. The executive recruitment techniques used by Ralph Andersen & Associates have been developed and used successfully with hundreds of clients for more than 42 years.

We feel that the key elements of the search process, which can be tailored to fit the specific needs of the City of Dublin, should include:

- Developing a comprehensive position profile based upon information obtained in meetings with the Mayor and other key stakeholders as appropriate.
- Extensive ***personal outreach***, in-person and via telephone, to qualified candidates within Ohio, the Midwest Region, and throughout the nation.
- A marketing strategy that uses selected advertising to supplement the extensive candidate identification process, uses the Internet and social media, and also uses professional contacts throughout Ohio, the Midwest Region, and the nation.

- A screening process that narrows the field of candidates to those that most closely match the needs of the City and is based on extensive reference checks and telephone interviews with the top candidates.

- Delivering a product in the form of a search report that recommends the top group of candidates and provides the decision-makers with detailed information about their backgrounds and experience.

- Assistance during the interview and selection process and in the negotiation of a compensation package.

Relevant Search Experience – City Managers

Ralph Andersen & Associates conducts a wide array of searches in the public sector, including key executives in local government – city managers. Our experience spans populations of all sizes, from the largest in the country to small and mid-size municipalities.

Current or recently completed City Manager searches conducted by Ralph Andersen & Associates (2011 to Present) are listed below.

- Alexandria, VA – City Manager (2011)
- Carlsbad, CA – City Manager (2014)
- Carson City, NV – City Manager (2014)
- Cincinnati, OH – City Manager (Current Search)
- Colma, CA – City Manager (2013)
- Davis, CA – City Manager (Current Search)
- Fountain Valley, CA – City Manager (2013)
- Green River, WY – City Administrator (2012)
- Greensboro, NC – City Manager (2012)
- Huntington Beach, CA – Assistant City Manager (2013)
- Kingsburg, CA – City Manager (2013)
- Lathrop, CA – City Manager (2012)
- Morgan Hill, CA – City Manager (2013)
- Oakland, CA – City Administrator (2011)
- Portola Valley, CA – Town Manager (2012)
- Ross, CA – Town Manager (2012)
- Santa Rosa, CA – City Manager (Current Search)

- Simi Valley, CA – City Manager (2013)
- South Lake Tahoe, CA – City Manager (Background) (2012)
- Upper Arlington, OH – City Manager (2011) – ***Brochure Attached***
- Windsor, CA – Town Manager (2012)
- Yorba Linda, CA – City Manager (2013)

References

At Ralph Andersen & Associates, we feel strongly that our past client relationships will attest to the professionalism of our services. We would be pleased to provide additional references upon the City's request.

A select number of city manager related references would be as follows:

- City of Upper Arlington (Councilmembers listed were on the Council at time of 2011 Search)
  Debbie Johnson, Council Vice President
  Erik Yassenoff, Council Member
  David DeCapua, Council Member
  -or-
  Ted Stanton, City Manager (Placement)
  City Hall: (614) 583-5030

- Consolidated Municipality of Carson City, Nevada
  Robert Crowell, Mayor
  Kaempfer, Crowell, Renshaw, Gronauer & Fiorentino, Law Firm
  Law Office: (775) 884-8300
  City Hall: (775) 887-2100
  -or-
  Melanie Bruketta, Human Resources Director
  Direct: (775) 283-7088
  Nick Marano, City Manager (Placement)
  City Manager's Office: (775) 887-2100

Resume / Biographical Information

The City of Dublin will have as the Project Director Ms. Heather Renschler, President/CEO of Ralph Andersen & Associates, who will be the recruiter and point of contact for all aspects of this search. The firm is prepared to dedicate all of its resources to ensure the successful and timely completion of this recruitment for the position of City Manager.

Ms. Heather Renschler, President/CEO

Ms. Renschler is the President/CEO of Ralph Andersen & Associates. Ms. Renschler has been with Ralph Andersen & Associates for more than 29 years. Ms. Renschler has overseen the recruitment practice of Ralph Andersen & Associates for the last 17 years and as a result, is often involved with recruitments on a national scale and those of a highly sensitive and critical nature. She is experienced at working in the field of city management and a wide range of other executive-level positions in the public sector. She is well versed in working with elected officials including city councils, county commissioners, and special districts in the recruitment and selection process. Her network of contacts and potential candidates is extensive and on a national scale. Prior to joining Ralph Andersen & Associates, Ms. Renschler had extensive private sector experience in the areas of construction management, health care, and public accounting.

As a native of Northwestern Ohio, Ms. Renschler attended the University of Toledo and majored in Accounting and Journalism. After working as a consultant to the public sector, Ms. Renschler later obtained a Bachelor's degree in Public Administration from the University of San Francisco.

A comprehensive listing of Ms. Renschler's placement experience over the last few years is provided as an attachment to this proposal.

It is anticipated that Ms. Renschler will devote 100% of the time needed to successfully complete this recruitment. However, if needed, Ms. Renschler will be assisted by Mr. Robert Burg, Executive Vice President of Ralph Andersen & Associates.

Paraprofessional and Support Staff based in the Sacramento Office will provide administrative support to Ms. Renschler recruitment assignments. Support services will also include extensive internet research. These staff are Ms. Diana Haussmann, Ms. Brianna Ham, Ms. Teresa Heple, Ms. Tiffany Taylor, and Ms. Hillari Bynum.

Search Work Plan

This section describes the usual steps in the search for a new City Manager for the City of Dublin. The search will be under the direction of Ms. Heather Renschler, Project Director.

Task 1 – Review Project Management Approach

Ms. Renschler, the Project Director, will meet with the Mayor and the City Council as well as other key stakeholders, as appropriate, to discuss the project management for the search. Also, Ms. Renschler would also want to spend time with the current City Manager that will be retiring in the near future. The discussion will include a review of the work plan, confirmation of timing, and communication methods.

Task 2 – Develop Position Profile

The position profile for the City Manager is the guide for the entire search process. ***Please refer to the attached sample (City of Upper Arlington) submitted with this Proposal.*** The development of the profile includes the collection of technical information and recruitment criteria.

Technical Information

Ms. Renschler will meet with the City Council and other key stakeholders as appropriate to gain an understanding of the experience and professional background requirements desired in the City Manager. These meetings will also help the search consultant gain an understanding of the work environment and the issues facing the City of Dublin.

Recruitment Criteria

The recruitment criteria are those personal and professional characteristics and experiences desired in the City Manager. The criteria should reflect the goals and priorities of the City of Dublin. Ms. Renschler will meet with the City Council and other key stakeholders as appropriate to facilitate the identification and articulation of that criteria.

Optional Services – The City Council may desire obtaining input from the Community on the qualities they would like to see in the new City Manager. To facilitate Community input, the Project Director will conduct one public meeting as well as offering the ability to submit comments through an on-line survey instrument. Additionally, our process will allow for email comments to Ralph Andersen & Associates relative to the desired qualities in the next City Manager.

Subsequent to the development and adoption of the candidate profile, the technical information and recruitment criteria will be documented in an information brochure prepared by the search consultant. The brochure will be reviewed by the City Council in draft format, revised as appropriate, and published for use throughout the search.

Task 3 – Outreach and Recruiting

This task is among the most important of the entire search. It is the focus of the activities of the search consultant and includes specific outreach and recruiting activities briefly described below.

Outreach

An accelerated outreach and advertising campaign will be developed. It will include the placement of ads in publications such as the *International City/County Management Association (ICMA), National League of Cities, Ohio Municipal League,* and other professional publications. Specific Internet sites related to government will be used, including *Careers In Government*, as a method of extending the specific outreach in a short period of time.

Ms. Renschler will be attending the 2014 International City/County Management Association Conference in Charlotte, North Carolina during mid-September. This will be an excellent opportunity to meet personally with highly qualified individuals in order to personally invite them to consider this opportunity with the City of Dublin, Ohio.

Additionally, the advertisement and the full text of the position profile (the recruitment brochure) will be placed on Ralph Andersen & Associates' home page, which is accessed by a large number of qualified candidates. This method of outreach to potential applicants provides a confidential source that is monitored by many key level executives on an ongoing basis.

Candidate Identification

Ralph Andersen & Associates will use their extensive contacts to focus the recruiting effort. In making these contacts, Ms. Renschler will target those individuals who meet the criteria set by the City Council. Each of the candidates identified through the recruiting ef-

forts will be sent an information brochure. Candidates will also be contacted directly to discuss the position and to solicit their interest in being considered.

Our approach to a successful search is characterized by a flexible, organized process and an aggressive recruitment program which includes targeted phone outreach to all recognized local and national city management professional associations including the Ohio Municipal League, ICMA, National League of Cities, and National Forum of Black Public Administrators. With a true national outreach and reputation, we are able to engage City Managers and other key stakeholders in Ohio, regionally, and across the nation.

Both the outreach and recruiting activities will result in applications and resumes from interested candidates. As they are received, resumes will be acknowledged and candidates will be advised of the general timing of the search process. The following tasks involve the actual selection process, once all resumes have been received.

Task 4 – Candidate Evaluation

This task will be conducted following the application closing date. It includes the following specific activities:

Screening

All of the applications will be carefully reviewed. Those that meet the recruitment criteria and minimum qualifications will be identified and subject to a more detailed evaluation. This evaluation will include consideration of such factors as professional experience, and size and complexity of the candidate's current organization as compared to the candidate profile.

Preliminary Reference Review

Ms. Renschler will conduct preliminary reference reviews for those candidates identified as the most qualified as a result of the screening process. Direct contact will be made with a limited number of references to learn more about the candidates' experience, past performance, and management style.

Preliminary Interviews via Skype

Ms. Renschler, as the Project Director, will conduct preliminary interviews with the top group of candidates identified through the screening and preliminary reference review processes. The interviews are extensive and designed to gain additional information about the candidates' experience, management style, and "fit" with the recruitment criteria. Interviews will be conducted using Skype or via telephone. No consultant travel for preliminary in-person interviews has been included in this proposal.

The screening portion of the candidate evaluation process typically reduces a field of applicants to approximately eight (8) to ten (10) individuals. Those individuals will be reviewed with the City prior to proceeding with the individual interviews.

Task 5 – Search Report

After completing Task 4, Ms. Renschler will meet with the City Council to review the search report on the top candidates. The report divides all of the candidates into three groups including 1) Highly Qualified; 2) Qualified; and 3) No Further Interest. The search report will include resumes for candidates in both the highly qualified and qualified groups. The results of reference reviews and interviews will be provided in writing. The results of the Search Report will be a confirmed group of finalist candidates (typically 5 - 6) that the City Council will interview in-person.

Task 6 – Selection

The final selection process will vary depending upon the desires of the City Council. The typical services provided by Ralph Andersen & Associates in the selection process are described briefly below:

- The Project Director will coordinate the selection process for the finalist group of candidates. This includes handling the logistical matters with candidates and with the City.

- Ralph Andersen & Associates will prepare an interview booklet that includes the executive candidate summary, resume, and candidate report (with interview comments, reference checks, and other relevant information about the candidates) on each candidate. In addition, the booklet will contain suggested questions and areas for discussion based upon the recruitment criteria. Copies of the interview booklet will be provided in advance of the candidate interviews.

- The Project Director will attend the interviews to assist the City through the selection process. This assistance will include an initial orientation, candidate introductions, and facilitation of discussion of candidates after all interviews have been completed.

- Verifications will be made on the top two (2) candidates and will include education verifications, Department of Motor Vehicle check, wants and warrants, civil and criminal litigation search, and credit check. The results of these verifications will be discussed with the City Council at the appropriate time.

- As needed, Ms. Renschler is available to provide assistance to the City Council in the final selection as may be desired. This assistance may include providing or obtaining any additional information desired to assist in making the final selection decision.

Task 7 – Negotiation

Ms. Renschler is available to assist the City in negotiating a compensation package with the selected candidate. This may include recommendations on setting compensation levels.

Additionally, Ralph Andersen & Associates will prepare a draft employment agreement and work with the City Attorney on the finalization of this document.

Task 8 – Close Out

After the City has reached agreement with the individual selected for the position, the search consultant will close out the search. These activities will include advising all of the finalist candidates of the status of the search by telephone.

Sample Recruitment Brochure

The recruitment brochure used for the City of Upper Arlington in 2011 for their City Manager search has been included for further review and consideration.

Overview of Sample Candidate Presentation Packet

The candidate assessment tools and search report prepared by Ralph Andersen & Associates are customized for each recruitment. However, the City would expect to receive the following:

- Review of Resumes Binder
  - Listing of All Applicants showing name and current position
  - Matrix of Experience for those candidates that are in the Highly Qualified group for an "at a glance" comparison of the top candidate's experience and qualifications
  - Listing of applicants in the Highly Qualified group along with their cover letter and resume
  - Listing of applicants in the Meets Minimum Qualifications group along with their cover letter and resume.
  - Listing of applicants in the Lacks Minimum Qualifications group – no cover letters or resumes are provided
- Interview Binder
  - Interview Schedule
  - Suggested Interview Questions
  - Matrix of Experience
  - For each finalist candidate:
    - ✓ Cover Letter
    - ✓ Resume
    - ✓ Responses to Supplemental Questions/Writing Sample

Cost

The search effort for a new City Manager will be national in scope with an emphasis and focus on candidates in Ohio and the Midwest Region. **The professional services fee for professional services and expenses to perform this search will be a fixed fee of $29,750.** This will include not more than three (3) trips to the City by the Project Director. Also, this pricing structure includes one (1) full background on the selected candidate. Should the City desire to background more than one (1) candidate the cost would be $2,800 for each additional candidate.

Optional Services – Should the City choose to conduct the Optional Community Meeting, the cost would be an additional $2,500 per day plus expenses unless scheduled the day of the kick-off meetings. Backgrounds on more than one candidate will be at the cost of $2,500 per candidate. Public announcements or advertisements would be handled and paid for by the City.

Brochure – A full color brochure will be developed for the City of Dublin similar to the attached sample (City of Upper Arlington). All pictures will be the responsibility of the City.

Invoicing – Ralph Andersen & Associates will bill the City of Dublin in five installments. The first installment of $6,000 will be due upon authorization to proceed. Invoices will be $6,000 each with the exception of final invoice of $5,750.

Exceptions – The City will be responsible for all candidate expenses related to on-site interviews and consultant travel for in-person screening interviews (if desired) for selected finalist candidates.

Ralph Andersen & Associates' Guarantee

Ralph Andersen & Associates offers the industry-standard guarantee on our search services. If within a one-year period after appointment the City Manager resigns or is dismissed for cause, we will conduct another search free of all charges for professional services. The City of Dublin would be expected to pay for the reimbursement of all incurred costs.

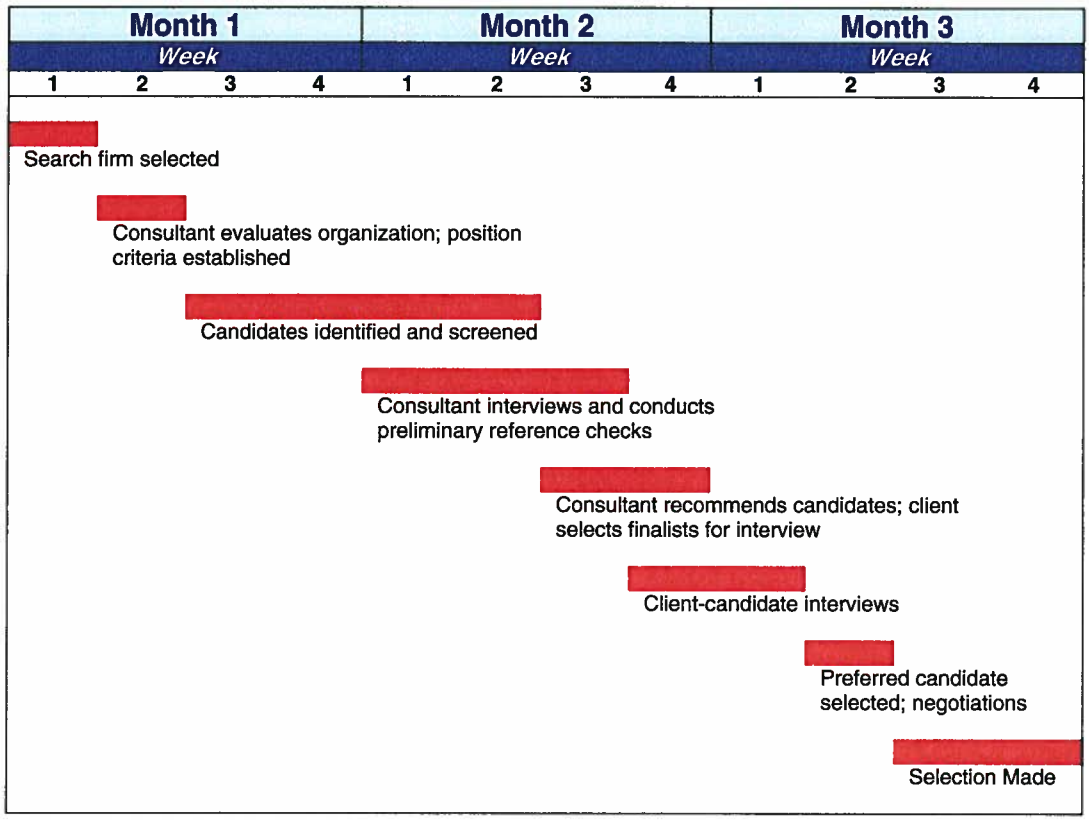
Minority Participation

Although not certified, Ralph Andersen & Associates is a woman-owned business enterprise with Ms. Heather Renschler being the majority stock holder. Additionally, of the firm's 14 employees (including 4 part-time interns), current staff includes: Hispanic – 2 and African American -1.

Project Timing

Ralph Andersen & Associates will complete an expedited search within the timetable established based on the pending retirement. Typically, a recruitment will be approximately 90 days from the execution of the agreement to the presentation of candidates (not including transition time for the Selected Candidate to join the organization). Negotiation with the top candidate will take an additional week or two after finalist interviews. We are prepared to begin this search upon verbal notification to proceed.

A brief overview of the recruitment schedule is presented on the following page. Please keep in mind that the schedule does not include transition time by Selected Candidate to join the City.



Client Listing

Ralph Andersen & Associates

Comprehensive Listing of Current and Recently Completed Executive Recruitments for Heather Renschler

Below is a full listing of other current and recently completed executive recruitments conducted by Heather Renschler, Project Director.

37th District Agricultural Association / Santa Maria Fairpark**
- General Manager / Chief Executive Officer

Alameda County Agricultural Fair Association
- Chief Executive Officer

Alameda County Flood Control (Zone 7) Water Agency
- General Manager
- Assistant General Manager

Alliance of Schools for Cooperative Insurance Programs (ASCIP)
- Director of Health Benefits

Antelope Valley East Kern Water Agency
- Assistant General Manager
- General Manager

Arlington, Texas
- Chief Financial Officer
- Human Resources Director

Association of Bay Area Governments (ABAG), California
- Interim Risk Manager
- Risk Manager

Belvedere, California
- City Manager
- Planning Director (City Planner)

** Project Team Member*
*** Co-Project Director*

5800 Stanford Ranch Road, Suite 410, Rocklin, California 95765 Phone: 916/630-4900 Fax: 916/630-4911 Website: www.ralphandersen.com

Beverly Hills, California
- Assistant Director of Administrative Services / Human Resources
- City Manager
- Community Services Director
- Director of Administrative Services / Chief Financial Officer

Big Bear Lake, California
- General Manager, Department of Water and Power

Broward County, Florida
- Assistant Director of Enterprise Technology Services
- Chief Financial Officer/Director of Finance and Administrative Services
- Chief Information Officer, Enterprise Technology Services**
- Deputy Chief Financial Officer/Deputy Director of Finance and Administrative Services
- Port Everglades Director of Finance

Calabasas, California
- City Manager
- Chief Financial Officer
- Public Works Director

California Center for Sustainable Energy
- Executive Director

California Community Economic Development Association
- Executive Director

California Fair Services Authority
- Executive Director

California Trucking Association
- Chief Executive Officer/Executive Vice President

Carmel Foundation
- President/CEO

Carmel-by-the-Sea, California
- Community Development Director
- Community Planning and Building Director
- Finance Manager (Backgrounds)
- Interim General Manager, Sunset Theatre Center
- Police Chief

** Project Team Member*
*** Co-Project Director*

Carson City, Nevada
- City Manager

Ceres, California
- City Engineer
- City Manager
- Community Development Director
- Director of Administrative Services
- Director of Operations & Maintenance
- Director of Public Safety
- Director of Parks, Recreation & Facilities
- Redevelopment & Economic Development Manager

Chico, California
- City Manager

Colma, California
- City Manager

Chino Basin Watermaster
- General Manager

Community College League of California
- President/CEO

Housing Authority of the County of Contra Costa
- Deputy Executive Director for Operations

Housing Authority of the Maricopa, Arizona
- Executive Director

Corte Madera, California
- Town Manager

Craig, Colorado
- City Manager

Cucamonga County Water District
- General Manager
- Director of Finance and Administration
- Project Engineer

** Project Team Member*
*** Co-Project Director*

Davis, California
- City Manager
- General Manager of Utilities, Development and Operations

Downey, California
- Principal Engineer – Utility Manager

Eastern Municipal Water District
- Assistant General Manager of Finance and Administration
- Deputy General Manager

Elsinore Valley Municipal Water District
- General Manager

Eugene, Oregon
- Airport Manager
- Chief Financial Officer
- Director of Public Works
- Director of Planning and Development
- Parks and Open Space Manager
- Planning Division Manager

Exposition Park (State of California)
- Executive Director

Fair Oaks Water District
- General Manager

Fallen Leaf Lake, California
- Concessionaire (Backgrounds)

Folsom, California
- City Attorney
- City Manager
- Community Development Director
- Director of Finance

Fort Lauderdale, Florida
- Deputy Director, Planning and Zoning
- Director of Finance

Franchise Tax Board (State of California)
- Executive Officer

** Project Team Member*
*** Co-Project Director*

Friends of Lane County Historical Museum (Oregon)
- Technical Assistance (Limited Assignment – Verifications only for Director)

Grass Valley, California
- City Administrator

Grover Beach, California
- City Manager

Hemet, California
- City Manager
- Director of Finance

Housing Authority of the City of Los Angeles, California
- President and CEO

Huntington Beach, California
- Assistant City Manager

Huntington Beach, California
- City Treasurer (Backgrounds)

Imperial County, California
- County Executive Officer

Indio, California
- City Manager
- Finance Director

Indio Water Authority, California
- General Manager

Inyo County, California
- Director, Water Department
- Planning Director

Irvine Ranch Water District, California
- Director of Water Operations
- Executive Director of Finance and Administration
- Executive Director of Operations

Kansas City, Missouri
- Administrator of Municipal Court
- Chief Innovation Officer

** Project Team Member*
*** Co-Project Director*

- City Auditor
- Deputy Director of Public Works
- Development Services Manager (Senior Planner)
- Director of Creative Services
- Manager of the Overflow Control Program
- Stormwater Utility Officer
- Wastewater Utility Officer

King County, Washington
- Director, Department of Adult and Juvenile Detention
- Public Defender

Kingsburg, California
- City Manager

La Habra Heights, California
- Finance Director Background

Lake Arrowhead Community Services District (California)
- General Manager

Lamp Community, California
- Executive Director

Lancaster, California
- Public Works Director

Lane County, Oregon
- Corrections Division Director (Jail Commander)

Lane County Regional Air Pollution Authority, Oregon
- Director (Partial)
- Operations Manager (Backgrounds)

Lathrop, California
- City Attorney
- City Manager
- Community Development Director
- Assistant Community Development Director

Lawrence-Douglas County Housing Authority
- Executive Director

Lee County Government, Florida
- Human Resources Director
- Library Director

Legislative Counsel Bureau, State of Nevada
- Director

Live Oak, California
- City Manager (Partial Recruitment)

Long Beach, California
- Bureau Manager, Traffic & Transportation
- Division Engineer (City Traffic Engineer)

Los Angeles, California
- City Administrative Officer
- City Clerk
- Department of Animal Services
  - ✓ General Manager
- Department of Cultural Affairs
  - ✓ General Manager
- Department of Recreation & Parks
  - ✓ General Manager
  - ✓ Executive Officer
  - ✓ Assistant General Manager, Planning & Construction
  - ✓ Assistant General Manager, Region Operations (partial)
  - ✓ Assistant General Manager, Community Services (partial)
- Department of Housing and Community Investment (HCID)
  - ✓ General Manager
- Department of Housing
  - ✓ Assistant General Manager, Housing
  - ✓ Assistant General Manager, Regulatory Compliance & Code
- Department of Public Works
  - ✓ Director of Public Works (CFO/Strategic Planning)
  - ✓ Director of Contract Administration (Inspector of Public Works)
- Department of Transportation
  - ✓ General Manager
- Department of Water and Power
  - ✓ Chief Information Officer (CIO)
  - ✓ Director of Customer Operations
  - ✓ Director of Energy Efficiency
- Fire Chief

- Information Technology Agency
  - ✓ Chief Technology Officer (General Manager)
- Office of Finance
  - ✓ Finance Director
  - ✓ Treasurer
- Office of Public Accountability
  - ✓ Executive Director/Ratepayer Advocate
  - ✓ Utility Rates and Policy Specialist III
  - ✓ Utility Rates and Policy Specialist II
  - ✓ Utility Rates and Policy Specialist I

Los Angeles City Employees' Retirement System (LACERS)
- Chief Investment Officer

Los Angeles County Office of Education
- General Counsel

Los Angeles World Airports
- Assistant General Manager, Design, Engineering & Construction
- Assistant General Manager, Strategic Planning & Implementation
- Assistant General Manager, Environmental Management/Transportation
- Chief Operating Officer
- Concessions Manager
- Deputy Executive Director, Business Development
- Deputy Executive Director, Chief Information Officer
- Deputy Executive Director, Finance
- Deputy Executive Director, Public and Community Relations
- Deputy Executive Director, Project & Facilities Development
- Executive Director

Los Angeles to Pasadena Metro Blue Line Construction Authority
- Chief Executive Officer
- Chief Administrative Officer

Los Angeles County, California
- Chief Executive Officer**
- Director of Planning
- Public Defender
- Registrar-Recorder/County Clerk**

Los Angeles County Employees Retirement Association (LACERA), California
- Chief Legal Counsel
- Director, Retiree Health Care Benefits

** Project Team Member*
*** Co-Project Director*

Los Angeles Unified School District

- Deputy Chief Executive – Facilities
- Deputy Chief Facilities Executive – Existing Facilities
- Director of Facilities Contracts
- Director of Facilities Projects
- Director of Operations- New Facilities
- Director of New Construction
- Director of School Building Planning
- New Construction Manager (multiple positions)
- Chief of Police
- Regional Director – New Construction (multiple positions)
- Senior Resident / Resident Construction Engineer (multiple positions)

Manhattan Beach, California

- City Manager

Manteca, California

- Economic Development Manager

Maricopa County, Arizona

- Director of Air Quality
- Director of Animal Care & Control
- Director, Department of Human Services
- Executive Director of Public Housing
- Director of Environmental Services*
- Department of Public Health
  - ✓ Executive Director
  - ✓ Medical Director
- Chief Engineer & General Manager, Flood Control District
- Public Works Director

Marin County, California

- Assistant Director of Finance
- Chief Operations Officer (Chief Assistant Director of Health & Human Services)
- Director of Cultural & Visitor Services
- Director of Parks and Open Space
- Public Defender

Menifee, California

- Finance Director

** Project Team Member*
*** Co-Project Director*

Metropolitan Transportation Commission (MTC)
- Associate Counsel (Partial Assistance)
- Director, Electronic Fares Program
- General Counsel
- Senior Counsel

Mill Valley, California
- Community Development Director

Millbrae, California
- Chief of Police
- Superintendent of Public Works

Modesto, California
- Airport Manager
- City Traffic Engineer
- Civil Engineers
- Deputy Director of Personnel
- Deputy Director Traffic & Development Services
- Traffic Engineers

Mono County, California
- County Administrative Officer

Monterey County Schools Insurance Group, California
- Executive Director

Montgomery County, Ohio
- Assistant Department of Job & Family Services Director
- Deputy Director, Sanitary Engineering Department
- Director of Animal Resource Center
- Director Department of Job & Family Services
- Public Works Director

Morgan Hill, California
- Assistant City Manager for Community Development
- City Manager

Mountain View, California
- Information Technology Director/Chief Information Officer

Murrieta, California
- City Manager

Napa County, California
- Assistant County Executive Officer
- Assistant Director of Corrections
- Chief Information Officer
- Deputy Director of Public Works – Flood control & Water Resources
- Director of Conservation, Development and Planning
- Director of Corrections
- Principal Transportation Engineer
- Public Defender

Napa County Transportation Agency
- Transportation Program Manager

Oakland, California
- City Administrator
- Interim City Administrator

Oakland Housing Authority, California
- Executive Director

Orange County Water District
- General Manager

Palo Alto, California
- Airport Manager
- Chief Building Official
- Chief Communications Officer
- Chief Information Officer
- City Auditor
- Fleet Manager
- Urban Forester

People for Parks
- Executive Director

Petaluma, California
- City Clerk
- Interim City Clerk
- City Manager
- Interim City Manager
- Finance Director
- Fire Chief
- Administrative Services Director

** Project Team Member*
*** Co-Project Director*

Placer County, California
- County Executive Officer
- Director of Health & Human Services
- Public Health Officer

Plumas County, California
- County Administrative Officer
- County Counsel
- Director of Planning and Building
- Director of Public Works

Port Hueneme, California
- City Manager

Port of Los Angeles, California
- Chief Information Officer
- Director of Environmental Management
- Director of Legislative Affairs
- Executive Director

Portola Valley, CA
- Town Manager

Prison Industry Authority (State of California)
- Executive Director

Rancho Cordova, California
- Director of Finance/Chief Financial Officer (Technical Assistance)
- Public Works Director (Technical Assistance)

Rancho Murieta Community Services District (California)
- Director of Administrative Services
- Director of Field Operations

Redwood City, California
- City Attorney

Regional Council of Rural Counties (California)
- President/CEO

Rocklin, California
- City Manager

Rosamond Community Services District, California
- General Manager

Roseville, California
- Deputy City Attorney

Ross, California
- Recreation Manager
- Town Manager

Sacramento Metropolitan Water Authority (SMWA) and Sacramento North Area Groundwater Authority (SNAGMA)
- General Manager

Sacramento Municipal Utility District (SMUD)
- Manager, Protection, Safety and Emergency Services

San Bernardino, California
- Director of Parks, Recreation, and Community Services
- Director of Human Resources
- Interim City Manager Backgrounds

San Bernardino County, California
- Director of Governmental & Legislative Affairs

San Bernardino County Employees' Retirement Association, California
- Chief Counsel
- Chief Executive Officer
- Investment Officer/Senior Investment Officer

San Bernardino Municipal Water Department, California
- Director of Finance
- Director of Water Reclamation

City and County of San Francisco, California
- Director, Log Cabin Ranch
- Director of Public Works
- Director, Probation Services
- Director of the Office of Early Care and Education
- Assistant Deputy Director, Recruitment and Assessment Services for the Department of Human Resources
- Principal Real Property Appraiser
- Recreation and Parks Director
- Workers' Compensation Director

** Project Team Member*
*** Co-Project Director*

San Francisco Arts Commission, California
- Director of Cultural Affairs

San Francisco International Airport, California
- Associate Deputy Airport Director, Hotel Developer
- Associate Deputy Airport Director, Safety & Security (Partial Search)
- Associate Deputy Director of Revenue (Economic) Development
- Airport Planning Director (Partial Search)
- Airport Risk Manager
- ITT Director (Airport CIO)
- Finance Director

San Francisco Public Utilities Commission, California
- Assistant General Manager, Infrastructure
- General Manager

San Joaquin Housing Authority (California)
- Director of Assisted Housing

Santa Barbara County, California
- County Executive Officer

Santa Monica, California
- Director of Public Works
- Assistant Director of Finance

Sausalito, California
- City Manager

Scotts Valley Water District, California
- General Manager

St. Barnabas Senior Services
- Executive Director

Schools Excess Liability Fund (SELF), California
- Executive Director
- Chief Executive Officer (formerly Executive Director)

Sedona, Arizona
- City Manager

Shasta-Trinity Schools Insurance Group (California)
- Executive Director

** Project Team Member*
*** Co-Project Director*

Sierra Joint Community College District (California)
- Superintendent/President

Simi Valley, California
- Chief of Police
- City Attorney
- City Manager
- Public Works Director

Solano County, California
- Agricultural Commissioner
- Budget Officer
- Director of Human Resources
- Director of Resource Management
- General Services Director
- Mental Health Deputy Director
- Public Defender

Solano Irrigation District, California
- General Manager
- Finance Director
- Water & Power Operations Manager

South Lake Tahoe, California
- City Manager (Background)

South Orange County Wastewater Authority, California
- General Manager

Southern California Association of Governments
- Deputy Executive Director
- Director of Government & Public Affairs
- Director of Legal Services/Chief Counsel
- Executive Director

Southgate Park and Recreation District
- General Manager

State of California, Department of General Services
- Deputy Director, Procurement Division**
- Deputy Director, Telecommunications Division

** Project Team Member*
*** Co-Project Director*

University of California, San Francisco
- Chief of Police

Upper Arlington, Ohio
- City Manager

Vista, California
- Fire Chief

Washoe County, Nevada
- County Manager

West Jordan, Utah
- City Manager
- Community Development Director

Western Municipal Water District (Riverside, California)
- Assistant General Manager
- General Manager
- Human Resources Manager
- Manager of Human Resources and Administration
- Water Resources Manager

Windsor, California
- Public Works Director

Yorba Linda, California
- City Manager

** Project Team Member*
*** Co-Project Director*

Sample

CITY OF | UPPER ARLINGTON

The premier suburb of Upper Arlington in Central Ohio is seeking your interest in the position of

City Manager

recruitment services provided by Ralph Andersen & Associates

Outstanding Career Opportunity

The City Council is seeking highly qualified candidates for consideration for the position of City Manager. This is an exciting opportunity for an experienced executive to lead an organization and guide the policy makers in upholding and maintaining the high quality of life that residents value and cherish.

The Community – Today

The City of Upper Arlington is one of the premier communities in Central Ohio and a first-ring residential suburb of Columbus. Approximately 90 years old, Upper Arlington is called home by more than 33,000 residents, with multiple generations of the same family to be found in close proximity to each other. In the mid-1970s, Upper Arlington residents made the conscious decision to halt its physical growth, and to shift its focus to maintaining and enhancing a quality residential environment, with the goal of growing deeper and stronger as a community.

Upper Arlington will celebrate its centennial in 2018.

With an ideal central location and close proximity to The Ohio State University, Upper Arlington residents are well educated and place great value on opportunities for continuing their own lifelong learning, as well as ensuring a quality learning environment for their children. Residents play an active role in their community, through numerous civic and service groups. And of note, residents, as well as businesses and developers, have been consistently reinvesting in their homes, neighborhoods, and community at unprecedented levels for many years, indicating their confidence in and commitment to the continued health and wellbeing of the community. This ongoing effort of reinvesting in Upper Arlington at high levels recognizes the strong demographics and a health future for the City.

Residents of Upper Arlington value its strong sense of tradition and community, excellent school system, beautiful neighborhoods with mature street trees, and the many exceptional safety and city services that are provided. Over the decades, the community has often been a leader in setting the standard for quality of life expectations. The City boasts an extensive and well-used network of community parks with a rich variety of active and passive recreational opportunities. Community gatherings and celebrations are the standard not the exception here, including a resident-driven Fourth of July parade and festival, summer concerts and other well attended community events such as Spring Fling, Fall Fest, and the Winter Festival. Recognized as one of the region's premier arts festivals, the Upper Arlington Labor Day Arts Festival is in its fifth decade. And, the popular Farmers' Market is held every Wednesday afternoon at the Mallway in Old Arlington featuring the finest Ohio-grown seasonal produce, fresh cut flowers, and other treasures.

The City Council is seeking a dynamic executive with a proven track record of fiscally prudent leadership, which includes successfully managing expenses, preserving investment in essential services, and expanding revenue sources.

Governing Structure

Upper Arlington's City Council is comprised of seven citizens who elected at-large by residents to serve a maximum of two, four-year ter The Council selects a President and Vice President from among its rank serve two-year terms. The President of Council presides over City Cou meetings and serves as Mayor for ceremonial duties. The Vice Presic assumes the duties of the President in his/her absence.

Council's responsibilities include establishing local laws, setting policy, proving programs, and generally overseeing the operations of the City. Council hires the City Manager, City Attorney, and Clerk of Council.

The City's Financial Overview

The City of Upper Arlington is a full-service city, including police and f with a total of 279 full-time equivalent employees. The approved 2011/2C biennial budget states the All Funds Budget is $55.4 million (including $1 million of capital projects). The City has a General Fund Budget of $29 mill with a projected 2011 ending fund balance of $12.8 million.

The City is proud to have attained a Triple A financial rating from two natio rating entities – Moody's Investors Services and Standard & Poor's. T is a rare and impressive achievement that few communities have attaine speaking to solid leadership, fiscal prudence and stability, and a healt community overall.

The Position

This career opportunity is a result of the pending retirement of Virginia Barne after serving the City for more than 10 years (since 2000). This at-will pos tion of City Manager reports directly to the City Council, and is responsib for implementing Council policy as well as managing th City's day-to-day operations. The City Manager oversee eight operating departments/divisions as follows: Ci Manager's Office, Development Department, Financ Department, Fire Division, Information Technolog Department, Parks & Recreation Department, Polic Division, and Public Services Department.

Additionally, the City Manager is a member of the Uppe Arlington Community Improvement Corporation (UACIC Board of Trustees which is comprised of 13 Trustees (six Public Sector Trus ees and seven Private Sector Trustees). The UACIC accomplishes its missio by building partnerships, identifying and evaluating economic developmer opportunities, making recommendations to city officials, and advocating fo and participating in projects that bring economic vitality to the community.

The Ideal Candidate

The City Council seeks an experienced professional who embraces an innovative and entrepreneurial leadership style with an emphasis on fiscal stewardship. This executive will be skilled in addressing ongoing organizational and financial challenges in today's economic times. Of continuing importance to the City Council is the focus on economic development and redevelopment – both of which are highly valued in a community such as the City of Upper Arlington that is nearly built-out. The ability to further expand and increase the current financial revenue base in order to better serve the community and continue to deliver top quality services are vital characteristics for the new City Manager. More specifically, the new City Manager will also have the ability to develop and implement economic development strategies that include specific objectives, activities, and successes in business retention and expansion, business recruitment, and urban redevelopment.

Ideally, this top caliber individual will also have broad-based experience drawn from a solid and well developed foundation in local government ***or*** gained through a professional career that combines public/private career accomplishments.

Equally important, the City Manager will be an action-oriented person who can successfully address a variety of issues using sound judgment and a well-honed business sense, while providing transparency in all of his/her dealings. The City Manager will have unquestionable personal integrity and display honesty and approachability in his/her commitment to the organization and the community. Top candidates will be skilled at facilitating open discussions, supporting debate on important issues, and addressing, through the City Council, the best common interests of the community.

Using outstanding interpersonal and communication skills, the City Manager will be eager to continue the strong working relationships in the local area as well as on a regional basis that have been valued by the City Council under the City's current leadership. The ideal candidate will also promote open dialogue and involvement with local and regional partners that extends to nearby and adjacent communities – City of Columbus and other suburbs/jurisdictions, Mid-Ohio Regional Planning Commission, Central Ohio Transit Authority, Central Ohio Consortium of First Suburbs, Franklin County, The Ohio State University, Upper Arlington School District, and the Upper Arlington Area Chamber of Commerce. The City Council also desires to have additional focus on reviewing options for shared services and cross-boundary solutions with local agencies.

The ideal candidate will also have personal attributes and qualities that include:

- Genuine interest in preserving the quality of life in Upper Arlington;
- Proven track record of fiscally prudent management, which includes successfully managing expenses, preserving investment in essential services (public safety, parks, transportation), and expanding revenue sources, including state and federal grants;
- A results-driven and business-oriented approach to organizational efficiency including strategic alignment with City Council priorities and clear performance objectives for staff;
- A personal style grounded in humility, integrity, and respect for others;
- A skilled leader and negotiator; able to manage and negotiate a variety of complex contractual agreements with developers, governmental bodies, and employee organizations;
- Commitment to promoting good government and transparency with staff, elected officials, union representatives, and the general public;
- Skilled in presenting all viable options and alternatives for the City Council's consideration with full disclosure of pros/cons and without bias; and
- Commitment to staff development and succession planning.

Challenges/Opportunities

The economic downturn has impacted Upper Arlington, necessitating some cutbacks and downsizing of staff in recent months. Much of these efforts have been achieved through not filling vacant positions and reorganizing within to streamline operations, without significantly impacting services. At the State level, however, pending issues may further impact – a proposed State budget that would cut the Local Government Fund by 25 percent in its first year and further in its second year, and threats to the Estate Tax – both significant revenue streams for the City.

Upper Arlington's resident demographics are impressive, and the City frequently taps into the professional expertise of community members, to help set and implement goals in areas such as recreational facilities and programming, as well as keeping economic development and land use goals on track. A review of the City's Master Plan is currently underway, utilizing members of the community working with staff, versus securing planning consultants to lead the efforts.

Other challenges/opportunities include:

- To date, economic development activities have been undertaken with the goal of diversifying the community's business base so that it would not be reliant on a small number of larger businesses. These efforts have been successful, keeping income tax revenues stable during an economic downturn. With many CEOs and business owners living here, there is a desire by many to be able to live and work in their community.
- Upper Arlington is land-locked and almost entirely developed. As a mature suburb with these limitations and a need to enhance revenues, the City must carefully look at its existing land for opportunities to intensify use. Only about five percent of the land is zoned commercial, therefore

a great emphasis has been made on facilitating the redevelopment and intensification of commercial districts (i.e., Kingsdale Shopping Center) to incorporate new development in a combination of office, retail, and restaurant uses. Since the community is well established, change of any nature poses a challenge with redevelopment projects directly impacting surrounding residents.

- With an increasing older adult population, the City is faced with finding ways to facilitate suitable housing and services for these residents, enabling them to age successfully within their community.
- As an older community, the City's infrastructure is likewise aging. Underground infrastructure is in need of repair, as are the City's aging roads. These necessary maintenance projects have been a priority for several years, with an aggressive seven-year Capital Improvements Program that tends to be carried forward year-to-year. Funding of these improvements in the future poses a significant challenge.
- Another direct result of the City's built-out nature is a shortage of land for public use, such as parks, sports fields, and other community facilities. The City has been able to maximize use of existing space and has even been able to add new parks in recent years. To date, several past efforts to develop a community center have been unsuccessful, with some disagreement in the community on whether or not this should be a public project. Community partnerships are proving invaluable for making the most of these facilities with a new all season facility nearing completion in the City's newest Park – Sunny 95 Park – thanks to the efforts of the community's Foundation.

Qualifying Experience & Education

Experience – Ideally, this position is well suited for an executive that has significant and relevant experience in a senior leadership role with a local government agency. A blend of both public sector and private sector experience may be considered a plus. Other candidates with non-governmental experience (i.e., non-profit or private sector) may also be considered if overall career history demonstrates transferable leadership skills in an executive-level position with comparable fiscal and managerial oversight. ***All highly qualified candidates are strongly encouraged to submit career credentials for consideration.***

Education – A Bachelor's degree is required. A Master's degree or other advanced degrees or certification(s) may be a plus.

Review of Qualifying Experience and Education – Ralph Andersen & Associates will assist the City Council in the screening and evaluation of resumes to determine the appropriate match of professional experience and education.

All interested individuals should be aware that this recruitment will comply with the State of Ohio public records laws.

Compensation & Benefits

The annual salary offered for this position will be within the range of $130,000 to $150,000 and will be dependent on qualifications, experience, and overall career history. In order to attract a broad array of qualified candidates, the City Council is prepared to include relocation/moving expenses. Benefits include retirement provided by the Ohio Public Employee Retirement System (OPERS) with the new City Manager paying 10% (employee share) of the contribution. The City does not participate in Social Security.

The City Council will negotiate an employment agreement with the successful candidate. Further details on the benefit package are available through Ralph Andersen & Associates.

To Be Considered

Candidates are encouraged to call Heather Renschler, Ralph Andersen & Associates, at (916) 630-4900 to schedule a confidential telephone appointment to discuss this career opportunity. First review of interested individuals will be conducted with the City Council during the last week of May 2011. Candidates are encouraged to formally submit ***or*** express interest prior to Wednesday, May 18, 2011. This recruitment is considered open until filled.

Only the top tier of individuals will be invited to interview with the City Council during early June 2011. A second round of interviews will be scheduled in late June or early July. It is anticipated that the newly selected City Manager will join the City of Upper Arlington during August or no later than mid-September. The City Council desires a smooth transition and every effort will be made to accommodate an orderly transition of leadership.

Candidates interested in formally applying for this position may submit materials to:

Ralph Andersen & Associates
5800 Stanford Ranch Road, Suite #410
Rocklin, California 95765
-or-
Send to: apply@ralphandersen.com

To be considered a candidate for this position, individuals will be required to formally submit the following: cover letter, comprehensive resume, current salary, and professional references. Candidates should be aware that references ***will not*** be contacted until mutual interest has been established.

Candidates are encouraged to conduct further research on the City of Upper Arlington at their website *(www.uaoh.net)*

The City of Upper Arlington is an equal opportunity employer.

Corporate Office
Ralph Andersen & Associates

5800 Stanford Ranch Road, Suite 410
Rocklin, California 95765
Phone: 916.630.4900
www.ralphandersen.com

COPY

City of Dublin

Executive Search Firm Services

July 18, 2014

Contact:
Julia D. Novak, President
The Novak Consulting Group
1776 Mentor Avenue
Cincinnati, Ohio 45212
(513) 221-0500
jnovak@thenovakconsultinggroup.com

The Novak Consulting Group

The Novak Consulting Group

July 18, 2014

Ms. Anne Clarke
Clerk of Council
City of Dublin Municipal Building
5200 Emerald Parkway
Dublin, Ohio 43017

Dear Ms. Clarke,

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

We are pleased to submit this proposal to the City of Dublin for the recruitment of a new City Manager. The Novak Consulting Group is a national, woman-owned firm with employees who have served as leaders in some of the best local governments across the country. We have had significant success working with organizations similar to Dublin and have placed chief executive officers in numerous communities across the country, as evidenced by our references.

Our project team for Dublin is comprised of skilled professionals, seasoned in local government management with search experience across the country. Additionally, our team will utilize its intimate understanding of and experience with the City of Dublin to assist the City Council in finding the right candidate for City Manager.

We have the necessary staff, expertise, resources, and abilities to conduct this recruitment and provide exceptional service to the City of Dublin. We are confident our approach will result in a successful leader for the organization. As president of The Novak Consulting Group, I am authorized to bind the firm. Please contact me at (513) 309-0444 or jnovak@thenovakconsultinggroup.com should you have any questions.

Sincerely,

Julia D Novak

Julia D. Novak
President

1776 Mentor Ave | Cincinnati, Ohio 45212 | 513.221.0500

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Introduction

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

In 2009, Julia D. Novak acquired Public Management Partners and founded The Novak Consulting Group, staffed by consultants with decades of collective experience. With The Novak Consulting Group, Julia built on Public Management Partners' reputation for innovation and results, while expanding the company's services. Her company meets a wider range of needs, consulting with governments in the areas of executive search, financial planning, organizational assessment, strategic planning, and more.

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

- **Niche expertise.** Our expertise lies in strengthening two kinds of organizations: local governments and nonprofits. We're consulting specialists rather than generalists, focusing our strengths to do a highly effective job for a very specific group of clients.

- **Flexibility to serve you better.** We employ a small core staff of four senior-level consultants and draw from our pool of subject matter experts when their expertise can help us serve you better. The result? A highly nimble, more efficient approach to giving you the services you need, when you need them.

- **Decades of collective experience.** Our associates and subject matter experts have decades of experience in strengthening local municipalities and non-profit organizations. They've served in a wide range of positions, from city manager to public works director to director of management information systems.

- **Personal service from senior-level consultants.** You appreciate it when deadlines are met, phone calls are retuned, and your challenges are given in-depth, out-of-the-box thinking. While a large firm may assign your business to junior-level people, we're small enough to offer very personal service from senior-level consultants.

The Novak Consulting Group is a woman-owned firm led by President Julia Novak and is incorporated in the State of Ohio. The firm is staffed with local government professionals, including six full-time associates, five subject matter specialists, and an office manager. The firm is headquartered in Cincinnati, Ohio and our staff is located in Washington, D.C., North Carolina, Kansas City, New York, and Wisconsin, in addition to Ohio.

As President, Julia Novak is authorized to bind the firm. Her contact information is included on the cover page.

Executive Search Approach and Methodology

When organizations need to fill key positions and turn to The Novak Consulting Group, they benefit from this guiding principle: meaningful hiring involves finding the right employee and preparing them for ongoing success. Our process encompasses each and every item included in Dublin's Scope of Work. However, let us more fully outline the phases of The Novak Consulting Group's approach to executive search services:

1. Inquiring, Understanding, and Defining

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

2. Candidate Search and Evaluation

To reach the right candidates, The Novak Consulting Group customizes each search process to fit the client's needs. Often, the professionals who best fit an open position are already employed and not looking for a traditional job posting. But because we have had the opportunity to work with cities and counties across the country, we are able to leverage our extensive, diverse professional network to attract the best talent nationwide. That network allows us to find qualified candidates, diversified in terms of race and ethnicity, gender, jurisdiction size, complexity of organization, and region of the country.

We are pleased that in seven recent city/village manager recruitments, females were appointed. In addition, in both city manager and other key department head roles, minority candidates were selected. We have been successful in other organizations at identifying a candidate pool that is racially, ethnically, and gender diverse. We advertise in national publications that target minorities and women, including the National Forum of Black Public Administrators (NFBPA) and the International Hispanic Network (IHN). We also work to identify qualified veterans and qualified candidates with disabilities. Once the right candidates are found, we help manage the hiring process from interviews to background checks. Our in-depth service empowers clients to achieve their goals at every step.

3. Supporting Success

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

By taking a holistic view to the hiring process with a goals-based approach to recruitment, our process ensures that each candidate will fit the role, as well as the organization. In the end, we are not just looking for a successful professional; we are finding the right employee to be successful as Dublin's City Manager long after he or she is hired.

Work Plan

Task 1 – Develop Candidate Profile

The Novak Consulting Group will begin this engagement by developing a solid understanding of the ideal City Manager candidate. We will first speak individually with the Mayor and each City Councilmember. It is important to recognize the individual expectations of each elected official, in addition to learning the shared goals for a new City Manager. Then we will then meet with the City Council as a body to learn about the expectations and desires for the position. We will discuss not just the technical skills needed to do the job, but also what traits and experiences are necessary for the right organizational fit. Finally, we will discuss the process, if desired, for soliciting input from the community and staff, even including an online community survey.

Based on the information learned during these discussions, we will develop a recruitment plan that includes Ohio, the region, and the nation. We will also prepare a position profile that is unique to Dublin, outlining the organization's needs, the strategic challenges of the position, and the personal and professional characteristics of the ideal candidate. The profile drives the recruitment, focuses our efforts on the most capable candidates, and helps us to persuade candidates to pursue the position.

We will also develop twelve-month organizational goals for the successful candidate based on our consultation with the City Council. These goals will ensure that: the applicants know what will be expected of them should they be hired; Dublin has thought about what they want the new City Manager to accomplish in the first year; and the successful candidate can hit the ground running with a work plan as soon as he or she starts.

Once drafted, we will review the recruitment plan, position profile, and twelve-month goals with the City Council. Modifications will be made as necessary before recruitment begins.

Task 2 - Conduct Aggressive Recruitment

The Novak Consulting Group will prepare and place all advertisements. These will be placed in state and national publications and online sites to attract candidates from the Ohio and the rest of the country. These will target networks and organizations, such as International City/County Management Association (ICMA), Ohio City/County Management Association, and other state manager and assistant groups.

Additionally, as part of the recruitment plan, we will have identified individuals and jurisdictions to contact via phone and email outreach. We have found that a combination of email and phone contacts is an effective way to reach top applicants, especially those who are not currently in the job market but may be willing to consider a move to an excellent organization like Dublin. We will begin the process of actively and aggressively marketing the position and identifying qualified candidates just as soon as the advertisements have been placed. We will also ask the Dublin governing body for names of individuals or organizations that might employ someone whom you think would make an outstanding city manager candidate. Finally, we will make use of social media platforms such as LinkedIn, Facebook, and Twitter.

The Novak Consulting Group will serve as the clearinghouse for all applications. As they are received, we will acknowledge each of them and keep prospective applicants informed of the process status.

Our project team members have led recruitments and worked in municipal governments across the country. Our team will utilize their professional connections, the firm's database, and direct outreach to find qualified candidates. We have extensive experience working with many jurisdictions across the country and have developed a national network which will help us identify a strong field of candidates from which to choose. Through targeted advertising, use of social media, and personal outreach to our national network of contacts, we are confident we will identify quality candidates to be considered for the City of Dublin City Manager position.

Task 3 – Facilitate City Manager Selection

The Novak Consulting Group will screen each application against the position profile and first-year goals and select a group of preliminary candidates. We will then conduct in-person and/or phone conversations with the semi-finalists to learn more about their interest, qualifications, and experience for this position. A written summary of this information will be shared with the City Council.

At a meeting with the governing body, we will review the list of all applicants as well as the top candidates that have the requisite skills and qualities needed for success in as the position. Based on our conversation, we will finalize a list of approximately five candidates to invite for in-person interviews.

Each person you wish to interview will then be contacted again by The Novak Consulting Group. We will speak with candidates' references to confirm the strength of their credentials for the position. We will also review published information found in search engines, online publications, and social media and perform background checks on top candidates.

The Novak Consulting Group will then facilitate the interview process, providing a summary of background information on each candidate as well as interview questions. If desired, the process could include the community in some form. The Novak Consulting Group will be available for follow-up interviews. Expenses for transportation and lodging of candidates will be borne by the City.

We can help the City Council make a well-informed choice by framing what we have learned about the candidates in the context of the position and its requirements but the selection of the top candidate for City Manager is for the City Council. We can also help you with the employment agreement, particularly in discussing compensation requirements with the preferred candidates. We will provide you information about best practices in employment agreements and compensation nationally and for similar positions in the market area. In addition, we will have obtained information on the candidate's salary. We will assist the City, as desired, in the negotiation process.

At the close of the search, all applicants will be notified of the results. Those who helped you in the process will be thanked for their contribution to a successful effort, and we will contact the successful candidate at various intervals during his/her first year on the job. We will talk with them about their progress toward implementation of the goals that were established for this position at the beginning of the process.

Recruitment Timeline

A draft recruitment schedule is included as Attachment A. We anticipate reviewing this schedule with the City during the initial project meeting.

Proposed Personnel

President Julia Novak will serve as engagement manager. Prior to establishing The Novak Consulting Group, Julia served as a Vice President for a local government consulting firm. She has over 26 years of experience working with and for local governments. During her local government career, she worked in Fort Collins, Colorado; Lexington, Massachusetts; Rockville, Maryland; and was City Manager of Rye, New York.

In her capacity as a local government manager, Julia managed successful search processes for a variety of executive positions, including:

- Police Chief - Rye, New York and Lexington, Massachusetts
- Fire Chief - Lexington, Massachusetts
- Director of Public Works – Rockville, Maryland and Lexington, Massachusetts
- Director of Planning and Development - Rye, New York and Rockville, Maryland
- Director of Information Technology - Rockville, Maryland
- Director of Finance - Rockville, Maryland
- Golf Club Manager- Rye, New York

Catherine Tuck Parrish, our Executive Search Practice Leader, will provide direct assistance to this recruitment. Catherine has more than 20 years of experience in serving local governments, in direct service or as a consultant. Most recently, she oversaw all Human Resources functions in the City of Rockville, Maryland and was involved in the recruitment and hiring of many of Rockville's 500+ employees. She is also familiar with County government having worked in the County Executive's Office in Fairfax County, Virginia on a variety of projects, including county-wide human resources projects.

In addition to the searches listed in this proposal, Catherine has assisted in search services for two cabinet-level positions in the City of Harrisburg, Pennsylvania: Chief of Fire and Business Administrator. Additionally, she has conducted searches for a CEO and multiple department-head level positions in the nonprofit sector. She has also facilitated elected official and department goal-setting sessions.

Analyst Haley Kadish will support Julia and Catherine in the recruitment by gathering salary comparison data, assisting with the recruitment brochure and advertisements, and compiling applicant data. Haley has provided support for multiple executive searches for the firm. Complete resumes of our consulting staff are included, and each member of our team can be contacted at our Cincinnati office.

Julia D. Novak, President

jnovak@thenovakconsultinggroup.com

Julia established The Novak Consulting Group in September 2009 when she acquired Public Management Partners. From 2003 to 2009, she served as a Vice President for a local government consulting firm. Julia has more than 25 years of experience working with and for local governments. She is a consultant, trainer and facilitator who has worked with numerous organizations and community groups. During her local government career, she worked in Fort Collins, Colorado; Lexington, Massachusetts; Rockville, Maryland; and was City Manager of Rye, New York.

Education

Master of Public Administration, University of Kansas, 1988

Bachelor of Arts, George Mason University, 1986

Professional Certifications

Certified Professional Manager, International City/County Management Association

Master Facilitator, The Myers-Briggs Personality Type Indicator

Industry Tenure

26 years

Consulting, 10 years

Local Government, 16 years

Julia has extensive experience as a facilitator and trainer. She has worked with elected official and appointed officials across the country to conduct goal setting, develop strategic plans and prioritize service delivery. She has conducted training for elected officials as an individual trainer and through the National League of Cities and a consortium of cities in California. Topics included leadership style and evaluating elected officials.

Julia has also established herself as a thought leader in the area of governance and administration. In April 2002, Julia was one of 20 practitioners who participated in the ICMA-sponsored symposium on the future of local government administration. Her response to Dr. James Svara's paper, "City Council, Roles, Performance, and the Form of Government," is included in the ICMA-published book, "The Future of Local Government Administration." In 2009, she co-authored an article with Dr. John Nalbandian for publication in *Public Management* Magazine called "Preparing Councils for Their Work." In 2010, Julia served as a trainer for a USAID Initiative in Baghdad, Iraq to develop the capacity of local advisors and councils in Iraq to engage in strategic planning, project management, policy analysis, and policy advocacy.

In 2000, the International City/County Management Association (ICMA) awarded Julia its Assistant's Excellence in Leadership Award for work she did building community and increasing organizational capacity as Deputy City Manager of Rockville, Maryland.

Julia has been a speaker at national conferences for the ICMA, National League of Cities and American Society of Public Administrators. She has been a featured speaker/trainer for many state associations, including Ohio, Vermont, New Hampshire, Pennsylvania, North Carolina, the Metropolitan (D.C.) Association of Local Government Administrators and the Illinois Assistant Municipal Managers Association.

Julia earned a bachelor's degree in government and politics from George Mason University and a master's degree in public administration from the University of Kansas. Julia was in the first class of individuals certified by ICMA as Credentialed Local Government Managers, and maintains that designation. She is certified to administer several level-B psychological assessments, including the Myers-Briggs Personality Type Indicator, Apter Motivational Styles Profile and the Strength Deployment Inventory. She also is trained in popular level-A assessments, including the Thomas-Killman Conflict Modes Inventory and the Human Element-B.

Catherine Tuck Parrish, Associate

ctuckparrish@thenovakconsultinggroup.com

Catherine has over 20 years of management experience working with local governments, non-profit organizations, and associations. She currently leads The Novak Consulting Group's executive search practice.

Education

Master of Public Administration, University of Kansas

Bachelor of Arts, University of Kansas

Industry Tenure

23 years

Consulting, 4 years

Local Government, 19 years

Her work as a consultant includes executive recruitment, project management, and contributions to numerous projects, including process improvement studies, strategic planning, departmental assessments, development review, and policy development. She has conducted successful executive searches for the positions of Chief Executive, Assistant Manager, Department Director, and other key staff. She has analyzed Human Resources, Inspections, Planning and Development, Communications, Public Works, Recreation, and Park functions for multiple organizations. She has also facilitated numerous governing body workshops and strategic planning sessions.

Catherine's most recent local government experience was as Deputy City Manager in Rockville, Maryland, where she oversaw Parks and Recreation, Human Resources, Information Technology, Finance, Communications, Customer Service, and Intergovernmental Functions. She also served as Assistant City Manager and Acting City Manager of Rockville for 11 months. Prior to joining the City of Rockville, Catherine served as Assistant to the County Executive of Fairfax County, Virginia, working on change management issues including a new pay system, employee surveys and implementation plans, and internal communication improvements. Catherine also served as Ethics Advisor at the International City/County Management Association (ICMA), counseling elected officials and citizen groups regarding employment agreements, form of government issues, and recruitment. Additionally, she served in the City Manager's Offices in Denton and University Park, Texas. Her experiences in these cities included securing initial state and federal transit grants, initiating a citizen newsletter, and acting as City liaison with neighborhood, civic, and university groups.

She chaired the ICMA's Acting Manager Task Force, which produced a handbook for interim managers. She served as Secretary, Vice President, and President of the Metropolitan Association of Local Government Assistants (MALGA) in the Illinois, DC metro area. She also led the Maryland City/County Management Association (MCCMA) as Vice President and President. Catherine has spoken at national and state conferences and recently spoke at the National League of Cities' Leadership Training Institute on recruiting and evaluating the CEO and served on an executive recruitment panel at the ICMA Conference. She also spoke with the ICMA Task Force on Women in the Profession about recruitment.

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

Haley Kadish, Analyst

hkadish@thenovakconsultinggroup.com

Haley has experience in both the public and private sectors. Prior to joining The Novak Consulting Group, Haley served as an ICMA Local Government Management Fellow in Catawba County, North Carolina. As a fellow, she improved the talent recruitment and selection process, developed departmental performance measures, assisted in the development and implementation of a community food sustainability plan, and improved operations by researching and analyzing options for many special projects.

Education

Master of Public Administration, Ohio State University

Bachelor of Art, University of Texas, Austin

Industry Tenure

Local Government, 3 years

Haley started her career in the private sector as a virtual solutions subject matter expert for Procter & Gamble. During her tenure, she launched and managed virtual consumer research services in multiple product categories and led a global team.

While in graduate school at Ohio State University, Haley served the Franklin County, Ohio Child Support Enforcement Agency as a program analysis intern and the U.S. State Department in Zambia as a public affairs intern.

Haley is also an accomplished artist and her analytic and technical skills are complemented by her design skills.

Haley earned a bachelor's degree in business administration from the University of Texas at Austin and a master's degree in public administration from The Ohio State University. She is a member of the International City/County Management Association.

Firm References

Below is a list of city manager/administrator searches completed by The Novak Consulting Group within the last 36 months. In addition, we are currently conducting the executive search for a Town Administrator in Berwyn Heights, Maryland.

A complete list of all recruitments is included with this proposal along with sample materials from a similar recruitment.

Jurisdiction	Size of Jurisdiction	Contact Information
City of Cleveland Heights, Ohio: City Manager	45,475	Dennis Wilcox, Mayor 40 Severance Circle, Cleveland Heights, OH (216) 870-2150 mayorwilcox@clvhts.com
City of Rehoboth Beach, Delaware: City Manager	1,375	Patrick Gossett, Commissioner, Personnel Committee Chair 229 Rehoboth Ave., Rehoboth Beach, DE (302) 227-4641 pgossett@cityofrehoboth.com
Miami Township, Ohio: Township Administrator	50,750	Andrew Papenek, Trustee President 2700 Lyons Rd., Miamisburg, OH (937) 433-9969 apapanek@miamitownship.com
City of Shoreline, Washington: City Manager	54,350	Keith McGlashan, Councilmember and Former Mayor 17500 Midvale Avenue N, Shoreline, WA (206) 801-2203 kmcglashan@shorelinewa.gov
City of Portsmouth, Ohio: City Manager	20,300	Kevin Johnson, City Council and Chair of City Manager Search Committee 728 Second St., Portsmouth, OH (740) 876-8558 kwwj@roadrunner.com
Town of Garrett Park, Maryland: Town Manager	1,025	Peter Benjamin, Mayor 4600 Waverly Avenue, Garrett Park, MD (301) 933-7488 peter.gpmayor@verizon.net
City of Hudson, Ohio: City Manager	22,325	Hal deSaussure, Council President 115 Executive Parkway, Suite 400 Hudson, OH (330) 697-5190 hdesaussure@hudson.oh.us
Washington Township, Ohio: Township Administrator	56,600	Denise Franzking, Township Trustee 6200 Eiterman Rd., Dublin, OH (614) 561-9939 dking@wtwp.com

Cost for Service

The total, not-to-exceed fee to complete the City Manager recruitment as outlined in our technical proposal will between $21,000 and $23,000, contingent on governing body direction regarding community engagement and the number of interviews. This range includes our total cost for professional services and expenses for the firm.

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

- Approximately $1,000-$1,500 for advertising
- Background checks for the top finalists at $175/finalist

Travel for finalists' interviews will also be borne by the City.

Attachment A – Recruitment Schedule

Dublin, Ohio

City Manager Recruitment Schedule

	start	2	3	4	5	6	7	8	9	10	11	12	13	14
	8/11	8/18	8/25	9/1	9/8	9/15	9/22	9/29	10/6	10/13	10/20	10/27	11/3	11/1(
Activity 1 - Develop Candidate Profile														
1.1 Meet with the City Council to identify skills and experiences for City Manager														
1.2 Review compensation strategy														
1.3 Gather input from key staff to determine organizational values and community issues														
1.4 Identify first year goals														
1.5 Review recruitment plan, position profile, and twelve month goals														
Activity 2 - Conduct Aggressive Recruitment	8/11	8/18	8/25	9/1	9/8	9/15	9/22	9/29	10/6	10/13	10/20	10/27	11/3	11/1(
2.1 Develop and place ads														
2.2 Develop and cultivate candidates														
2.3 Receive application materials														
2.4 Communicate with candidates														
Activity 3 - Facilitate City Manager Selection	8/11	8/18	8/25	9/1	9/8	9/15	9/22	9/29	10/6	10/13	10/20	10/27	11/3	11/1(
3.1 Conduct pre-screening of candidates to develop recommended semi-finalist group														
3.2 Develop summary report on all semi-finalists														
3.3 Recommend top 3-5 finalists for interviews														
3.4 Conduct reference and background checks on top finalists														
3.5 Arrange interview process and prepare all materials														
3.6 Facilitate candidate interviews and top candidate selection														
3.7 Assist with negotiations, as requested														
3.8 Inform all applicants of final outcome														
3.9 Perform post-selection goal progress check-in														

executive search solutions

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

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

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

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

The Novak Consulting Group

a better executive search process

The Novak Consulting Group

1 ASSESS NEEDS

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

2 FIND THE RIGHT CANDIDATES

identify, assess and recruit the best person to accomplish goals

3 DEVELOP PLAN FOR SUCCESS

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

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

FILLING KEY POSITIONS, SUCH AS:

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

IN AREAS THAT INCLUDE

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

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

Selection and Retention Process

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

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

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

The Novak Consulting Group Difference

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

How do you increase efficiency? Where do you find additional savings after you've already tightened your belt? What's the best way to communicate with your constituents? Who do you call when you need an outside expert to corroborate your action plan? ***At The Novak Consulting Group, we help government and nonprofit organizations answer tough questions so they operate more effectively.***

bringing solutions into focus.

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The Novak Consulting Group

leadership expertise. exceptional service.

The Novak Consulting Group

We offer our clients innovative thinking that strengthens organizations by bringing solutions into focus. Our management consulting services combine the personal attention and flexibility of a small firm with the sophistication and senior-level expertise of a large firm.

- ***FACILITATION & STRATEGIC PLANNING: Leading planning sessions for successful outcomes.*** Managing group processes is equal parts art and skill. We've facilitated countless group exercises including staff retreats and goal setting conversations with governing bodies. We excel at navigating complex interpersonal dynamics within an organization to ensure its employees are aligned to carry out its vision.

- ***COMMUNITY ENGAGEMENT: Gathering information and creating community consensus.*** Within any organization or community, people have vastly different ideas, values and sensitivities. Our community outreach and engagement gathers input across multiple groups of people with a variety of perspectives and making them all feel invested in a project. We use techniques from simple to highly innovative to mine information that leads to finding common goals.

- ***TRAINING: Engaging employees to increase investment and productivity.*** It's never been more important to invest in your workforce than today, when employees are increasingly asked to take on new responsibilities. We give them the tools to succeed with workshops that address concerns, improve communication and customer service and help them better handle conflict.

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

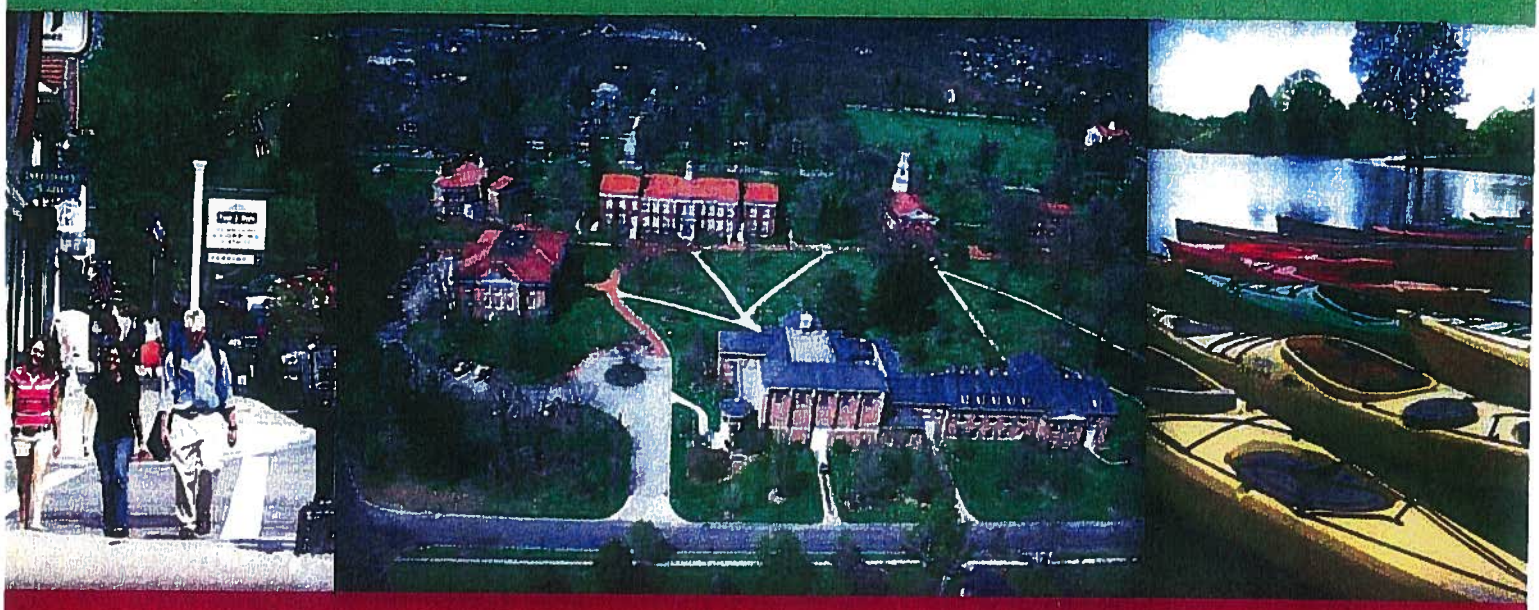
- ***ORGANIZATIONAL ASSESSMENT & OPTIMIZATION: Maximizing efficiency and productivity.*** Assessing and optimizing organizational performance is one of our core services. We evaluate operations at every level, from a single department to the organization as a whole.

- ***FINANCIAL PLANNING: Long-term financial planning for long-term success.*** Effective financial planning takes more than simply budgeting. It requires taking a multi-year look at revenues and expenses to ensure an organization's financial sustainability. Our multi-year financial plans provide a critical operational and capital perspective.

- ***ORGANIZATIONAL DEVELOPMENT: A top-to-bottom approach to enhance organizations.*** What does it take for an organization to function more efficiently and more effectively? It takes vision, direction, values, goals and commitment from every employee at every level. Our consultants have enabled the success of many local governments and non profits by evaluating their operations, creating priorities, proposing a plan, and guiding them through its implementation.

513-221-0500
TheNovakConsultingGroup.com
210 Glenmary Ave.
Cincinnati, OH 45220

The Novak Consulting Group



recruitment announcement

OHIO

HUDSON

City Manager

position description:

City Manager – Hudson, Ohio

The Position

The City Manager serves as the Chief Executive Officer of the City and is responsible for implementing the policies and work plan goals of the City Council and providing leadership, coordination, and development for the City departments. The City Manager oversees all City operations and staff, which are organized in the following departments: Communications, Community Development, Economic Development, Ellsworth Meadows Golf Club, EMS, Engineering, Finance, Fire, GIS, Hudson Cable TV, Human Resources, Information Services, Parks, Police, and Public Works. The City provides water and electric utilities to its businesses and residents and participates in the Northeast Ohio Regional Sewer District. The City employs 149 full-time employees and 41 part-time employees in addition to seasonal and volunteer employees. The City has a 2014 General Fund disbursements budget of $20,829,057, with total departmental expenditures totaling $11,820,468.

The first review of resumes will be May 19. This position is open until filled

The City of Hudson has operated under the Mayor-Council-Manager form of government since 1958. The City has a seven member City Council, four elected by ward and three elected at-large, and an elected mayor. In addition to appointing the City Manager and Clerk of Council, the City Council confirms the City Manager's appointment of the Director of EMS, Finance Director, Fire Chief, Police Chief, and Solicitor.

All application materials are subject to disclosure under Ohio's public records laws.

Requirements and Preferred Qualifications

Requirements for the position of the City Manager include a Bachelor's degree in public administration or related field and 7-10 years of managerial experience, including department head, Assistant Manager, or City/County Manager experience in a comparable local government. Preferred qualifications include a Master's degree in public or business administration and demonstrated experience in economic development, redevelopment and business retention programs, collective bargaining, long-term financial planning, and utilities. Ohio local government experience and ICMA-CM also preferred but not required. As outlined in the City's charter, the City Manager need not be a resident of the City of Hudson at the time of appointment, but shall within a reasonable time after appointment establish and maintain residency in the municipality, unless otherwise approved by Council.

Applications are being accepted electronically by The Novak Consulting Group. To apply, go to thenovakconsultinggroup.com/jobs to complete a brief online form and then you will be prompted to submit a cover letter, resume with a list of 3-5 professional references, and 5-year salary history via apply@thenovakconsultinggroup.com. The first review of resumes will be May 19. This position is open until filled. All application materials are subject to disclosure under Ohio's public records laws.

The Novak Consulting Group

The Ideal Candidate

The ideal City Manager will be an experienced, ethical, hard-working local government leader who is a creative thinker with mature judgment, tough skin, good humor and respect for others. The ideal candidate will develop strong working relationships with the school system, community groups, and business leaders, utilizing partnerships and collaboration to solve community issues. The next City Manager will have a comprehensive approach to planning and decision-making incorporating thorough research, and provide well-formulated recommendations to elected officials. The City Manager will be an excellent communicator who can effectively articulate complex issues, including the short and long-term implications to policy choices. The City Manager will be committed to personal and professional development, goal-setting, and performance accountability for all employees. The City Manager will bring fresh ideas, best practices, a conservative fiscal approach, and be able to articulate a strategic vision for the community.

The expected hiring salary range is $130,000 – 150,000 DOO/DOE, with an excellent benefit package.

Questions should be directed to Catherine Tuck Parrish at 240-832-1778 or the email address at the bottom of the page.

The Community

The City of Hudson is located between Cleveland and Akron in northeast Ohio. Originally part of the Connecticut Western Reserve, Hudson celebrated its bicentennial in 1999. Covering 25.6 square miles, Hudson has a population of over 22,000 residents and the median household income was $116,188 in 2012. Hudson is known for its excellent school system, strong financial management with a AAA bond rating, and well-educated residents who are engaged in their schools and their community.

(over, please)

The Community *(continued)*

The City's active volunteer spirit, commitment to historic preservation and pride of place make Hudson a unique and desirable community. The Hudson Historic Downtown District includes many commercial and residential buildings that are on the National Register of Historic Places. Visitors often describe Hudson as having a quaint, New England charm. Schools in the City of Hudson are rated among the top in the nation and the City was named one of the "100 Best Communities for Young People" in 2010. There are 20 parks, totaling more than 1,000 acres of parkland in the City, giving residents access to fishing, boating, sand volleyball, disc golf, ball fields, soccer fields, community gardens, a skate park, playgrounds, hiking trails, grills, picnic tables and pavilions.

The City has over 900 businesses and a strong housing base. The median household income is $116,000 and the median home price is $286,500, both well above the state average and among the highest in the Cleveland-Akron area. Hudson residents are well-educated with 68% who hold a bachelor's degree or higher, and the City has an 88% homeownership rate among residents.

Mission

The mission of the Hudson City government is to serve, promote and support, in a fiscally conservative manner, an outstanding community that values quality of life, a well-balanced tax base, historic preservation with a vision to the future and professionalism in volunteer and public service.

Applications are being accepted electronically by The Novak Consulting Group. To apply, go to thenovakconsultinggroup.com/jobs to complete a brief online form and then you will be prompted to submit a cover letter, resume with a list of 3-5 professional references, and 5-year salary history via apply@thenovakconsultinggroup.com. The first review of resumes will be May 19. This position is open until filled. All application materials are subject to disclosure under Ohio's public records laws.

who we work for

The Novak Consulting Group

LOCAL GOVERNMENTS

Organization	Project Type
Aberdeen, Maryland	Executive Search, Customer Service Training, Council Retreat
Adams County, Colorado	Strategic Planning
Albemarle, North Carolina	Council Retreat
Allen, Texas	Council & Staff Facilitation & Strategic Planning
Ann Arbor, Michigan	Council Goal Setting, Executive Retreat
Ann Arbor Transportation Authority	Board Retreat
Aurora, Colorado	Facilitation & Strategic Planning
Berwyn Heights, Maryland	Executive Search
Blue Ash, Ohio	Council Goal Setting
Boulder, Colorado	Financial Operations Review, HR Dept. Review, Strategic Planning & Facilitation, Executive Coaching, Financial Planning Support
Brevard, North Carolina	Training
Cary, North Carolina	Facilitation & Strategic Planning
Cedar Hill, Texas	Council Goal Setting
Cincinnati, Ohio	Priority Based Budgeting & Community Engagement, Strategic Planning & Facilitation
Clayton, Missouri	Council & Staff Facilitation & Strategic Planning, Community Based Strategic Planning
Cleveland Heights, Ohio	Executive Search, Council Goal Setting, Strategic Operations Review
Delaware County, Ohio	Government Body Retreat
Delaware County, Ohio, E911 Authority	Board of Directors Retreat
Dublin, Ohio	Council Goal Setting, Program Definition/Performance, Management, Executive Search, Facilitation & Strategic Planning, Employee Climate Assessment
Evanston, Illinois	Organizational Assessment
Fort Collins, Colorado	Financial Operations Review, Council Goal Setting, City Manager Evaluation Facilitation
Fredericksburg, Virginia	Organizational Assessment
Gahanna, Ohio	Council Goal Setting
Gaithersburg, Maryland	Executive Search
Garden City, Kansas	Financial Model, Municipal Court Operation Review

Organization	Project Type
Garrett Park, Maryland	Executive Search
Gilroy, California	Police Dept. Staffing Assessment
Greensboro, North Carolina	Efficiency Review - Collections Department
Groton, Connecticut	Performance Management
Hillsboro, Oregon	Council Goal Setting
Hudson, Ohio	Executive Search
Ithaca, New York	Performance Management, Organizational Assessment, Strategic Planning & Facilitation
Kent County, Deleware	Executive Search
Lancaster, Texas	Council & Staff Facilitation & Strategic Planning, Executive Search
Lancaster County, Pennsylvania	Facilities Review
La Plata County, Colorado	Organizational Assessment & Optimization
La Plata, Maryland	Executive Search
Loudoun County, Virginia	Executive Search
Manchester, Connecticut	Performance Management, Council & Staff Facilitation & Strategic Planning
Mansfield, Connecticut	Performance Management Training
Maryland State Judiciary	Strategic Planning
Maryville, Missouri	Council Goal Setting
Miami Township, Ohio	Executive Search
Murray, Utah	Council & Staff Facilitation & Strategic Planning, Organizational Assessment & Optimization
Nanitoke, Pennsylvania	Solid Waste Privatization
New Carrollton, Maryland	Executive Search
New Jersey Public Health	Customer Service & Performance Measures Training
New Orleans, Louisiana	Development Review Process Improvement
Norman, Oklahoma	Organizational Restructuring, Police Shift Scheduling Analysis
Novi, Michigan	Executive Search, Compensation Study
Oberlin, Ohio	Council Goal Setting
Palo Alto, California	Strategic Planning

who we work for

The Novak Consulting Group

LOCAL GOVERNMENTS

Organization	Project Type
Pennsylvania Department of Community & Economic Development	Act 47 Coordinator for Harrisburg, PA, Receivers Plan Development & Implementation, Act 47 Coordinator for Farrell & Duquesne
Pennsylvania Department of Community & Economic Development	Act 47 Plan Development & Implementation Team for Reading, PA – led by Public Financial Management
Peoria, Arizona	Executive Search
Pioneer Valley Planning Commission, Massachusetts	Police Shared Services Assessment
Portsmouth, Ohio	Executive Search
Raleigh, North Carolina	Staff Retreat
Rehoboth Beach, Delaware	Executive Search
Rockville, Maryland	Development Review Process Mapping, Council Goal Setting
Routt County, Colorado	Strategic Planning
Sandusky, Ohio	Executive Search
San Luis Obispo, California	Council Goal Setting
Sequim, Washington	Staff Leadership Training Council Goal Setting, Employee Climate Assessment

Organization	Project Type
Shawnee, Kansas	Public Works Strategic & Organizational Plan
Shoreline, Washington	Staff Leadership Training, Executive Search
Sikesville, Missouri	Council Retreat
South Jordan, Utah	Council Goal Setting
St. Louis County, Missouri	Children's Service Fund Strategic Planning
Swansboro, North Carolina	Council Goal Setting
Sykesville, Maryland	Executive Search
University City, Missouri	Council Goal Setting
Upper Arlington, Ohio	Council Goal Setting, Executive Search Support
Vienna, Virginia	Council Goal Setting, Executive Management Retreat
Washington Township, Ohio	Organizational Assessment, Executive Search
Westerville, Ohio	Executive Search
Westminster, Colorado	Strategic Planning
Wilmington, North Carolina	Development Review
Worthington, Ohio	Strategic Planning, Council Goal Setting
The Woodlands, Texas	Police Dept. Assessment

NON-PROFIT ORGANIZATIONS

Organization	Project Type
California-Nevada Annual Conference	Governance Model Restructuring
Baltimore-Washington Conference, United Methodist Church	Organizational Assessment
General Board of Global Ministries	Executive Search, Implementation Support Communications Manual, Governance Structure Evaluation, Strategic Planning, Department Integration, Succession Planning, Performance Management
General Board of Discipleship	Executive Search
General Board of Higher Education & Ministry	Organizational Audit, Executive Search
ICMA	Char Meck Sustainability Facilitation
Justice For Our Neighbors	Facilitation & Strategic Planning

Organization	Project Type
Louisiana Annual Conference	Strategic Planning
Midland Community Foundation	Community Based Strategic Planning
Minnesota Municipal League	Training
National Legion of Cities	Training
Ohio City Management Association	Facilitation & Strategic Planning
United Methodist Committee on Relief (UMCOR)	Staff Leadership Training, Strategic Planning
UMC Connectional Table	Evaluation Program for Connectional System
Western Pennsylvania Annual Conference	Executive Search

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Inside/Outside: The Hiring Options

by Doug Miller, Clay Pearson, and Catherine Tuck Parrish

Each time a department head, assistant, or another local government management staff member leaves his or her position, the manager has a big decision to make. The vacant position needs to be filled, and the manager has choices on how to do it: Fill the position internally or bring in someone from outside the organization. Either course of action has valid reasons.

It is tempting to use the promotion as a way to keep someone who might not be ready for the position but whom you don't want to lose to another job. These are all compelling reasons to promote from within. You should, however, do this only if you are certain that the internal candidate or candidates are ready for this move, and it is a good long-term solution for the organization.

One important thing to remember is that applicants are customers of the recruitment process, and their experience with a community in the interview phase is part of how a management team sells the community to prospective applicants. It is important that candidates get a full picture of the job as well as the people and the environment in which they will be working.

The Society for Human Resource Management reports the average cost of replacing an employee is between half to two times the employee's annual salary.[1] This includes lost productivity as well as advertising and recruitment costs whether conducted in-house or by a recruiting organization. It also involves human resource staff time, along with the time of others involved in the selection process, orientation, and training costs for the new hire.

GET THE PROCESS STARTED

Like so many equations in local governments, there is more than one right answer on which candidate to hire. Will you offer the position to a qualified internal candidate or search outside the organization? In tough economic times, it's possible that a local government may lean more than usual towards hiring from within.

An internal hire provides the quickest way to fill a position, allows employees to advance within the organization, can save money through reshuffling of job responsibilities, and can open up promotional opportunities at lower levels of the organization. In some cases, this may be the only mechanism you have to reward a top employee, especially in years when few merit or cost-of-living raises have been given.

Conversely, always consider the internal options first before automatically looking outside the organization. You may have someone who is ready for the next step and could compete well for the position.

Internal and external recruitments are not mutually exclusive. You may want to see, for example, how potential internal candidates stack up against "the best" from the outside. If there isn't an internal candidate who will be an immediate hire, opening up the position to external candidates can do these things:

- It can provide internal candidates with a great experience and the chance to show their stuff against those from other organizations.
- It can give the manager confidence and buy-in from others involved in the selection process by going through a full recruitment process.
- It puts all applicants on a level playing field, something that is extremely important for an open recruitment process and a well-run organization.

Once you've decided to open up the process to external candidates, make sure it's truly an open, fair process for everyone involved. If you have internal candidates, make sure they are clear about the process and have the support and time off they need to participate fully.

Encourage them to take the entire day off to prepare and make the mental shift between the work day and the interview. Talk to selection panel members and make sure that they make the candidate feel at ease but ask follow-up questions even if an answer is obvious.

Make sure internal candidates are prepped as much as the external ones and are offered the same things that external candidates are—tours, documents, and discussions with the outside recruiter (if a recruiter is part of the process).

CASE STUDY: SELECTING FROM INSIDE

Aberdeen, Maryland, a community experiencing massive growth from an influx of jobs associated with the federal Base Relocation and Closure Act (BRAC), recently needed to replace its police chief. While an internal candidate was serving in the acting police chief capacity, the city wanted to have a national search and was committed to an open process with no expected outcome for either an internal or external candidate.

The acting police chief was serving the community well but there was a strong desire to hire the best possible candidate. Rapid growth and increasing urbanization were changing the community and its policing needs. New ideas and approaches to policing were desired to continue to keep residents and businesses safe now and as the community grows.

Initial conversations to learn about the organizational and community values, as well as traits and experiences needed for success, included department heads and other key staff, along with the mayor. An aggressive external recruitment process began, and the job attracted a large number of police chiefs and high-level command staff from large and smaller jurisdictions within Maryland, the national capital region, and across the country.

PANEL PLAYS KEY ROLE

Semifinalists were interviewed and ultimately a finalist group of highly qualified police chiefs emerged. Reference and preliminary background information was gathered on the finalists prior to the interviews. Finalists provided a writing sample and also answered questions in advance of the final interviews.

An interview panel included leaders from the business, civic, and city organization, along with a well-respected police chief in the state. This panel was important in the hiring process. Its members were able to question the candidates from a different angle than initial interviewers: They were asking the tough technical questions instead of looking at chemistry and motivation.

The panel's collective and individual viewpoints were extremely important and played an important role in the decision-making process. The panel not only contributed valuable input to the city manager's final decision, it also made that decision a comfortable one.

The manager held one-on-one interviews with the candidates. The process also included a tour with the mayor and a public reception that included councilmembers, department heads, and police department command staff.

A TOUGH DECISION

Two top candidates emerged: the acting chief and an external candidate serving as a police chief in a neighboring state. Both candidates showed vision, leadership, and had values that aligned well with the community and the organization. Both candidates had thoroughly researched the position and were knowledgeable about the community, the organization, and the future needs for both.

The manager weighed heavily the experience of both candidates. The acting chief had shown he was able to make tough decisions and had the support of the mayor and council, community, and officers. The external candidate had also shown leadership, had dealt with complex community and policing issues, and was a recognized expert in community-based policing.

The manager's selection decision was difficult but ultimately he selected the acting police chief. He cited his past performance in the command staff, along with his on-the-job experience and ability to move the department forward, while serving in the acting role.

The fact that the city conducted a bona fide national search strengthened the acting chief's stature once he was appointed. Everyone in the organization knew that he had earned the appointment and overcame a slate of other qualified police professionals.

If the recruitment process had not been conducted honestly and thoroughly with the internal candidate being offered the job, the appointment could have been viewed less favorably in the ranks.

CASE STUDY: SELECTING FROM OUTSIDE

Novi is located in southeastern Michigan, 25 minutes from downtown Detroit and the University of Michigan - Ann Arbor, as well as 55 minutes from Michigan State University in East Lansing. With a reputation for innovation, quality, and

Typical Inside/Outside Hiring Scenarios

These scenarios depict general hiring goals followed by the reasoning that a hypothetical local government manager might employ to decide to hire either internally or externally.

This person is a known commodity. . .

Hiring inside: This candidate was part of the organization when I got here. I had a chance to watch him manage some important projects, make presentations to the council, and participate in interdepartmental initiatives. No guessing here, this person can do the job. I know what I am getting.

Hiring outside: This is not the first time this person has been selected to serve in this position. This woman has an established track record and has participated on other executive leadership teams. I know she is ready and wants to join this organization. I know what I am getting.

I want to change the culture. . .

Hiring inside: For the past few years I have been working with my leadership team to create a culture of accountability based on shared values. This person has seen the evolution and has demonstrated a commitment to and understanding of the type of workplace I want to create.

Hiring outside: This hire is an opportunity to bring someone in who has been part of the cultural evolution in another community. I have had a chance to see employee survey results from this person's department, and he has done there what I am trying to do here!

I want to send a message. . .

Hiring inside: My message is clear: This is an organization that plans for succession and develops talent from within. This is an organization that rewards top performers, and she is one!

Hiring outside: I am bringing in the "best of the best" and am investing in the organization by hiring top talent!

We need fresh ideas. . .

Hiring inside: I want someone who hasn't "been-there-done-that" and is creative and open to a new way of running a department, providing a service, and so forth. This person hasn't been spoiled by too many years in the same position and has ideas that she is eager to implement.

Hiring outside: We need some new blood, someone who has worked in other places and will bring a variety of experiences and new approaches to service delivery and our community's future. I need someone who can see things differently and will be able to implement creative solutions.

I need a partner to turn this area around. . .

Hiring inside: In this position, I need to have someone whom I trust. I need someone who gets me and understands the vision I have and can help me implement it. I know that this person will be able to get things moving in a different direction since she knows all the players.

Hiring outside: In this position, I need to have someone whom I trust. I need to have a partner in this department who will not resist the changes that need to be made. He is free of the notion of how things used to be and has no personal baggage that will be an impediment.

We need someone with a proven track record. . .

Hiring inside: I have seen this person perform in good times and under pressure. I know how to play to the person's strengths and can live with the weaknesses. He is respected in the community, and I will have council support for this hire.

Hiring outside: I need someone who has already proven themselves in this area with results. I see the fruits of this person's work, and I want her to help us get those results here. The council and organization will value her experience and be confident that she can get the job done.
We can't afford to fail in this position. . .

Hiring inside: I need someone who understands the political climate and organizational needs. This position is too important for us to have to spend more time and energy recruiting if an outside person doesn't make it. I need the safer candidate.

Hiring outside: This is not a time that I can afford to train someone to do this job. I don't have time to devote to this and need to make sure the person we hire can do this starting on day one. I need the safer candidate.

financial stability, Novi had an opening for an assistant city manager. It decided that conducting a national search to find external candidates to compete with potential internal applicants was a priority.

With executive-search assistance, the department heads and key staff including the city manager had an opportunity to articulate their desires for the position in terms of education, type of experience, traits and values, and results achieved in past positions. At the end of these conversations a profile for the position emerged that included a list of goals for the assistant manager's first year. Some department heads initially expressed possible interest in the position but ultimately,

none opted to apply for the position. Novi does not have an assistant to the city manager position or budget manager position, so there were no generalist or internal candidates. This position, however, did attract a great deal of talented applicants from several states.

RECRUITMENT PROCESS SELLS COMMUNITY

One important thing to remember is that applicants are customers of the recruitment process, and their experience with a community in the interview phase is part of how a management team sells the community to prospective applicants. It is important that candidates get a full picture of the job as well as the people and the environment in which they will be working.

In Novi's case, a semifinalist group was interviewed and prescreened prior to the selection of a finalist group for interviews. The finalists provided writing samples in advance for review. Reference and preliminary background checks were conducted providing more context and information about each candidate's ability to perform in past positions, illuminating their leadership values and organizational management experience.

Tips for Setting Up a Selection Process

Regardless of whether you are looking for a candidate from inside or outside an organization, the person hired needs to be a good fit for the organization. Here are tips for setting up a process that will help ensure the right selection is made:

- Take time up-front to clearly define responsibilities of the position.
- Talk to the people who will be working with the individual on a daily basis to find out how they interact and what they think is important for the position. This includes the hiring supervisor but also direct reports and customers of the position, as appropriate.
- Articulate what the organization's values are, which must be shared by the top candidates.
- Determine what the biggest issues have been in the past year and what is coming in the next 12 months.
- Develop a process that mimics the type of work that will be expected; for example, writing exercises, analytical problem solving, presentations, and question-and-answer sessions.
- Schedule informal and formal interactions during the interview process.
- Ask the people who interacted with the candidates to provide you with feedback.

Finalists were taken on a tour of Novi and were also interviewed by two panels. Debriefing sessions were held with the city manager and the panels to identify strengths, weaknesses, and areas for further discussion with finalists. The manager considered all the input that was received and after deliberation and further conversation with the top candidates, selected an external candidate as assistant city manager.

While matching Novi's organizational values, especially a clear commitment to public service and high ethical standards and innovation, were critical factors in the screening process, it was also important that proof of strategic thinking, demonstrated project-management skills, and the desire and ability to think and perform quickly to deliver the highest quality services to residents were also essential.

The confidence and capability of a proven professional who brought fresh ideas and the ability to run the city in the city manager's absence with the full confidence of the council was also important. In this case, the external search-and-selection process was the right fit for Novi, the organization, and the manager.

At the conclusion of a recruitment process, fit is critical. The right candidate may come from across the country or from down the hall, but the manager needs to make sure the person who is hired is positioned to be successful in the role.

ENDNOTE

[1] Retaining Talent: A Guide to Analyzing and Managing Employee Turnover (2008), David G. Allen, Ph.D., SPHR website, membership-only section: "Research suggests that direct replacement costs can reach as high as 50 percent to 60 percent of an employee's annual salary, with total costs associated with turnover ranging from 90 percent to 200 percent of annual salary."

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ORIGINAL

CITY OF DUBLIN, OHIO
CITY MANAGER
EXECUTIVE SEARCH FIRM SERVICES

THE MERCER GROUP, INC.
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JAMES L. MERCER

July 18, 2014

The Mercer Group, Inc.

Consultants To Management

INTRODUCTION

The Mercer Group, Inc. is an independent management consulting firm incorporated in the State of Georgia and operating nation-wide. The firm was founded by James L. Mercer, a long-term public management consultant. The Mercer Group, Inc. has 29 dedicated full time professional consultants. The firm has been in business under this name sine 1990 and Mr. Mercer has been involved in management consulting, with an emphasis on recruitment for local governments, for over thirty (30) years. The firm has been conducting City Manager/Administrator searches for over 30 years. Our firm has conducted prior work for the City of Dublin.

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

This important engagement will be conducted by Mr. James L. Mercer. Mr. Mercer has conducted or assisted in the conduct of more than 2000 successful executive searches in recent years. Mr. Clark Wurzberger is a Senior Vice President of The Mercer Group, Inc. Mr. Mercer and Mr. Wurzberger are authorized to make representations for and to bind The Mercer Group, Inc. Mr. Mercer can be reached at 505-466-9500 and Mr. Wurzberger can be reached at 530-637-4559.

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July 18, 2014

Ms. Anne Clarke, Clerk of Council
City of Dublin
5200 Emerald Parkway
Dublin, OH 43017

Dear Ms. Clarke:

The Mercer Group, Inc. is most pleased to submit this proposal to assist the City of Dublin to recruit nationally and to develop exceptionally well-qualified candidates for the position of City Manager. We are most interested in assisting the City of Dublin with this critical project, and if selected to conduct the search, would have no difficulty beginning the project immediately and expediting our work to ensure a smooth process. The Mercer Group, Inc. has extensive experience in conducting city manager searches locally and nationally. Our firm probably conducts more city manager searches throughout the year in the United States than any other public sector recruitment firm. We are especially well qualified to conduct this search for the City of Dublin.

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

It is our understanding that:

- The City of Dublin is seeking "turn-key" executive search services and support in connection with the recruitment of a new City Manager.
- The City of Dublin is interested in identifying outstanding candidates and filling the position of City Manager.
- Services required include position analysis and preparation of position profiles, recruitment for the position; inviting potential candidates to apply; reviewing and screening applications; conducting interviews, reference checks and background checks of selected candidates; recommending a list of final candidates; coordinating final interviews; negotiating; and following up.

- The City of Dublin wishes to conduct a comprehensive national recruitment process, to ensure the best qualified candidates are found and that the best qualified individuals who are acceptable can be hired.
- The annual salary and benefits package for the position will be discussed with the City Council.

Our Philosophy and Approach

Our firm's strategy to complete this recruitment is to work closely with key personnel in the City of Dublin to determine what Dublin is seeking in their next City Manager.

Our firm's philosophy is to conduct a thorough and mutually rewarding executive search process that results in a long-term placement and leaves the client with the desire to utilize our services again in the future. We will tailor the process to fit the City of Dublin by spending quality time at the beginning of the search talking with key City of Dublin elected officials and personnel to determine issues, processes in place and being placed, and discussing how the next City Manager will fit into or should fit into these scenarios.

After reviewing written materials provided by the City and meeting with elected officials and others of your choice to determine their objectives relative to the search, we would conduct the following steps:

1. Analyze the position and draft a Position/Recruitment Profile/Brochure.
2. Recruit for the position on a regional and national basis.
3. Invite potential candidates to apply who meet the criteria established by the City.
4. Review and screen applications.
5. Conduct interviews and background checks of selected candidates.
6. Recommend a list of final candidates with candidate reports, suggested questions and forms.
7. Coordinate final interviews, conduct final background checks, negotiation and follow-up.

1. Position Analysis

We will have extensive consultation with the City Council, other key City staff and local leaders selected by them, as well as other individuals or groups (if you wish) to determine 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. In addition, we will spend a considerable amount of time at the beginning of the process with the appropriate City of Dublin personnel in order to determine the level of experience and training needed.

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

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

2. Recruitment Process

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

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

We will provide the City Council with several advertising alternatives with varying degrees of cost and their associated benefits. Based on our discussions with the City Council, we will place ads in professional journals, online at appropriate websites for this field, and in various minority and women's publications to encourage applicants to apply. We will also discuss with the City Council other places where they would like ads placed.

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/Brochure". 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/Brochure.

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

Once the initial screening is completed, we will select the prospective candidates who most closely match the criteria established by the City Council. 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 City Council. This matrix will be reviewed with the City Council in group

meetings and guidance obtained prior to proceeding. One contingency here is that the City Council 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 City Council, we will personally interview each using various interview techniques. We will closely examine their experience, qualifications and achievements in view of the selection criteria and our professional expertise in evaluating the quality of such qualifications and achievements.

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

5. Background Investigations

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

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

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

6. Interview Process

Based on the preceding steps, a recommended list of finalists for the 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 City Council in a detailed written format (Interview Guide) combined with the results of the background investigation and candidate screening. We will make a recommendation on a group of five (5) to seven (7) finalists. The City Council shall make the final decision on which and how many candidates will be interviewed.

Our report will be presented in a meeting with the City Council in which we will discuss our recommendations and provide background information, sample questions and a rating form for the interviews. We can also assist the City Council at no extra charge in conducting targeted selection and/or simulation processes with finalists, if desired.

In particular, we will explain which, if any, of the applicants specifically meet the total criteria established by the City Council or whether the final group simply represents the best available talent.

We will also provide the City Council with our recommendations relative to timing, sequencing, location, setting, format, and conduct of interviews with the finalists. We will provide information about trends in employment, employment contracts and agreements, relocation expenses, perquisites, appropriate role for spouses, receptions, etc. We will arrange schedules for top candidate interviews with the City Council 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 City Council 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 Council and that any public statement should come directly from the City Council. We will maintain confidentiality of candidate information, to the degree possible, under Ohio law.

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

Once the new City Manager has been on board for 30 days or so, we will conduct a session with the City Council and with the new City Manager in order to establish mutual performance criteria and goals for the position. In this regard, we will work with the City Council to define the role of the new City Manager within the City of Dublin.

We will follow-up periodically with the City Council and the new City Manager during the first year in order to make any adjustments that may be necessary.

We will keep the City Council closely informed and involved in decisions concerning the search process at all times. We will prepare and send to the City Council bi-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 Council's deadlines and an itemization of expenses incurred-to-date and expected to be incurred during each succeeding project step.

Support from the City Council will be needed, as follows:

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

Our approach is highly interactive and significantly involves the client in all important steps of the process.

PREVIOUS/CURRENT CITY MANAGER/ADMINISTRATOR SEARCHES

Angel Fire, New Mexico - Village Manager - 2011
Arlington, Texas - City Manager - 2011
Chesapeake, Virginia - City Manager - 2012
Cleburne, Texas - City Manager - 2011
College Park, Georgia - City Manager - 2013
Covington, Georgia - City Manager - 2013
Danville, Kentucky - City Manager - 2011
Des Moines, Iowa - City Manager - 2014
East Point, Georgia - City Manager - 2012
Erie, Colorado - Town Administrator - 2011
Estes Park, Colorado - Town Administrator - 2011
Florence, South Carolina - City Manager - 2011
Fountain Hills, Arizona - Town Manager - 2011
Goldsboro, North Carolina - City Manager - 2011
Holland, Michigan - City Manager - 2011
League City, Texas - City Manager - 2012
Littleton, Colorado - City Manager - 2011
Oneonta, New York - City Manager - 2012
Pittsburg, Kansas - City Manager - 2012
Port Arthur, Texas - City Manager - 2011
Questa, New Mexico - Village Administrator - 2011
Raton, New Mexico - City Manager - 2011
Rockport, Texas - City Manager - 2011
Rocky Hill, Connecticut - Town Manager - 2014
Saint Clair Shores, Michigan - City Manager - 2013

Sheridan, Colorado - City Manager - 2011
Sun Valley, Idaho - City Administrator - 2012
Taos, New Mexico - City Manager (Limited Scope) - 2012
Takoma Park, Maryland - City Manager - 2013
Timnath, Colorado - Town Manager - 2011
Troy, Michigan - City Manager - 2012
Villa Park, Illinois - Village Manager - 2011
Wentzville, Missouri - City Administrator - 2013
Wentzville, Missouri - City Administrator - 2012
White House, Tennessee - City Administrator - 2012
Winchester, Virginia - City Manager - 2011
Yankton, South Dakota - City Manager - 2012

Our firm conducts approximately 65 searches per year so we are submitting a sample list of contact names, telephone numbers and email addresses, including the size of the community, with regard to our executive search experience as follow:

Honorable Alfonzo King, Mayor
President of North Carolina Municipal League
City of Goldsboro; population: 38,313
919-580-4362
c/o mbrewer@ci.goldsboro.nc.us

Mr. Terrence Moore, City Manager
City of College Park; population: 13,900
404-669-3756
tmoore@collegeparkga.com

Ms. Meg Casasanta, Chairwoman - Executive Search Committee
Town of Rocky Hill; population: 19,729
860-670-3107 (Cell number)
mcasasanta@rockyhillct.gov

Ms. Amy Mixen, IPMA-CP, Human Resources Director
City of Wentzville; population: 29,070
636-639-2007
amy.mixen@wentzvillemo.org

Ms. Alexis B. Blackwell, Human Resources Director
City of Takoma Park; population: 17,205
301-891-7201
alexisb@takomagov.org

Mr. Jay Schlum, Former Mayor
Town of Fountain Hills; population: 22, 275
480-289-7433
jschlum@telesphere.com

Mr. Ken Buchanan, Town Manager
Town of Fountain Hills; population: 22, 275
480-816-5107
kbuchanan@fh.az.gov

Mr. Ron Scott, City Manager
City of Danville; population: 16,218
853-238-1200
rscott@danvilleky.org

Honorable Dr. Robert Cluck, Mayor
City of Arlington; population: 364,000
817-459-6122
robert.cluck@arlingtontx.gov

Mr. James Mercer is President/CEO of The Mercer Group, Inc. He possesses Bachelor of Science and Master of Business Administration degrees from the University of Nevada and is a former Assistant City Manager of Raleigh, North Carolina. He is a Certified Management Consultant, and previously served as VP/Partner with Korn/Ferry International (the world's largest executive search firm) and as Director of Management Consulting Services for Coopers & Lybrand. Mr. Mercer is President of The Mercer Group, Inc., a firm which he founded. Mr. Mercer will serve as lead consultant on the project. Mr. Mercer can be reached at 505-466-9500, jmercer@mercergroupinc.com, and web address is www.mercergroupinc.com

Mr. Clark Wurzberger will serve as co-consultant with Mr. Mercer on the project. Mr. Wurzberger is Senior Vice President of The Mercer Group, Inc. in the California office. He has over twenty-six years of public sector experience. Mr. Wurzberger holds a Bachelor's Degree in English from San Diego State University. Mr. Wurzberger served for seven years as Senior Associate with Hughes, Perry & Associates (formerly Hughes, Heiss & Associates), a highly regarded California-based public sector management consulting firm providing executive search and other consulting services to local government clients in California and other states since 1974. Mr. Wurzberger specializes in public sector executive search. Mr. Wurzberger can be reached at 530-637-4559, cwurzberger@excite.com, and web address is www.mercergroupinc.com

Ms. Karolyn Prince-Mercer will also serve as co-consultant with Mr. Mercer on the project. Ms. Prince-Mercer is Senior Vice President in the Santa Fe office. She received her Bachelor of Arts degree in History with minors in Art, Political Science and Education from the University of Nevada. She received her Doctor of Jurisprudence degree from Woodrow Wilson College of Law. She is licensed to practice law in New Mexico and in Georgia. Ms. Prince-Mercer is qualified to administer and evaluate Myers-Briggs Type Indicator materials. Ms. Prince-Mercer has been in management consulting for 19 years. She has experience working in executive search, compensation and classification, and organization and management studies. Ms. Prince-Mercer can be reached at 505-660-5503, **kprince-mercer@mercergroupinc.com**, and web address is **www.mercergroupinc.com**

We have a number of minority and women placements in key executive positions and are proud of that record.

Schedule

Our search process normally takes about 90 to 120 days from date of approval of the Recruitment Profile/Brochure by the client. The more time we have, within reason, of course, the more effectively we can conduct thorough evaluation and background checks on finalist candidates.

Code of Ethics

Mr. Mercer is a Member and subscribes to the Code of Ethics of the International City/County Management Association and to the Institute of Management Consultants, USA.

Guarantees

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

1. We will keep working until the placement is made.
2. We will not recruit the placement for other positions without your permission.
3. We will not recruit any of your staff for two years from the date of the placement, without your permission.
4. If the selected candidate leaves your employ within the first two years, we will redo the search for expenses only.

Reasonable Fees

Our fees to conduct a search of this type are competitive and are $16,500, plus out-of-pocket expenses not-to-exceed $8,000. Because our firm has conducted prior searches for the City of Dublin we are giving a $1,500 discount for repeat business. Items typical of a similar search with their typical costs are broken down below. Since we are conducting other consulting work around the country, expenses can be kept to a minimum.

Position Analysis	$ 2,000
Advertising Campaign	3,000
Resume Review	1,750
Candidate Screening	4,000
Background Investigation	4,250
Interview Process	1,000
Negotiation and Follow-up	500
TOTAL FEE	**$16,500**
DISCOUNT FOR REPEAT BUSINESS	**$1,500**
TOTAL DISCOUNTED FEE	**$15,000**

Expenses, not-to-exceed out-of-pocket in the amount of $8,000.00 are for consultant travel, lodging and per diem, telephone, correspondence, advertising, research, sourcing, reference and background investigation, data assemblage and distribution, and report preparation. Because newspaper advertising is often expensive we would like to discuss with the client the benefits of placing an ad before a decision is made to do so.

Because of our other ongoing consulting and search work and our experience, expenses should be kept to a minimum. The cost for final candidates to travel to interview with the City Council is not included. Such costs are typically 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. Typically, out-of-state costs run about $750 to $1,000 per person.

The City of Dublin's liability to The Mercer Group, Inc. for services rendered under this agreement will not exceed the agreed upon price unless an increase is authorized by the City Council in writing.

We will submit monthly invoices for fees and expenses. It is our practice to bill one-third at the start of the search, one-third upon delivery of the semi-finalist candidate materials, and one-third upon delivery of the Final Report (Interview Guide with candidate information/materials). Each invoice is due and payable upon receipt. Expenses will be billed in addition and shown as a separate figure.

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

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

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

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

The benefits to be obtained based on the detailed description of how the recruitment is to be conducted as set out above include a good understanding by the interested parties in Dublin of what is wanted in the next City Manager, a recruitment brochure fitted to the City of Dublin to attract the best qualified candidates to the position and an understanding of the steps to be taken to attract the best candidates. The general nature was stated in our firm's strategy and philosophy, to work closely with the City of Dublin elected officials and personnel to determine issues, processes in place and being placed, and discussing how the next City Manager will fit into or should fit into these scenarios. Our placements usually stay in the position for an average of 8 years. Please note our firm's Code of Ethics and most important guarantees also factor into the benefits for the City of Dublin.

Our firm has several minority individuals which are full-time, dedicated consultants and who are currently working on searches for various positions in local government. Because of their involvement with other clients Mr. Mercer will be the lead consultant with Mr. Wurzberger and Ms. Prince-Mercer to assist him.

Please contact me at 505-466-9500 if you have questions.

Thank you for the opportunity to present our qualifications. I will look forward to hearing from you.

Sincerely yours,

THE MERCER GROUP, INC.

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

APPENDIX

JOHN DOE
CANDIDATE FOR THE POSITION OF
CITY MANAGER
CITY, STATE

Education and Professional Development

Mr. Doe states that he received his Master of Public Administration degree in 2000 from the University of Daytona in Daytona, Ohio. He received his Bachelor of Arts degree in Public Administration in 1976, from Little University in Little, Ohio. This was confirmed by the National Student Clearinghouse, an online service.

Mr. Doe continues his professional development through memberships such as the International City/County Management Association, Alliance for Innovation, and National Association of City Administrators.

Experience

According to Mr. Doe, he began his career in local government management in 1976 with the City of Vandiville, Georgia, as its Assistant City Manager. In 1981, he was hired by the City of Sloe River, Wyoming, as its City Administrator. Mr. Doe became the City Manager for the City of Oshkosh, Colorado, in 1987. In 1994, Mr. Doe became the Deputy/Acting County Administrator for Marietta County, Tennessee. Somerville County, Florida, hired Mr. Doe in 1999 as its County Manager, his most recent position.

Somerville County, Florida, once stretched from the Georgia line to Port Charlotte and now is a county consisting of 969 square miles with a population of 249,000 people. The County includes the County seat of Somerville and eight other historic smaller municipalities. It also contains extensive natural preservation areas, new urbanism inspired developments, and substantial agricultural operations. There are two state parks within the County. Demographically it is one of the youngest counties due to the location as home of both the University of New Thought and another college with student bodies totaling 65,000.

Some accomplishments in Mr. Doe's career of which he is most proud include:

> **Professional Organizational Development**: One of Mr. Doe's most rewarding career accomplishments came with his first position as City Administrator. The western town of Sloe River, Wyoming, brought him out from Vandiville, Georgia, as its first professional administrator to establish a municipal structure in a rapidly growing energy boomtown impacted by activities of six major mineral and energy companies. He states that he crafted all formal personnel, purchasing, and administrative procedures, while conducting community planning activities and building extensive capital improvements. When he arrived there were literally people living in cars and tepees, as there was insufficient housing, medical, and community facilities.
>
> **Somerville County government** has won awards for its citizen engagement, community planning, performance management, and purchasing systems, reflects a continuing record of accomplishment in creating an effective, efficient and ethical organization providing innovative service delivery.

Economic Development and Job Creation: Mr. Doe states that his role in community economic development has been in numerous organizational structures but he is currently a part of a game changing steering committee of community and academic leaders in a collaboration effort called Innovation Somerville.

Comprehensive Planning: His career track reflects service to communities where design and planning are taken seriously. Both the Somerville County and Martinsville County comprehensive planning efforts have been recognized as best practices in planning and have implemented APA award winning innovations in environmental and agricultural protections, transportation/transit oriented development, energy conservation, community healthcare, and low impact development.

Somerville County Forever Environmental Lands Program: Working with a variety of community interests they have held two successful public referendums to fund and acquire environmental lands throughout the County from willing sellers. This is a process that recognizes private property rights and payment for private lands or conservation easements deemed of public benefit in natural systems while leveraging local funding. Through this program open space has been preserved forever for the enjoyment of future generations, outdoor recreation venues have been expanded, and a network of wildlife habitats preserved and connected.

Waterfront Development: Two legacies he states that he is most proud are the US Walk of Fame in Oshkosh and Martinville County. The space walk was conceived and developed while he was CRA Director in Oshkosh to create a river front walk on the Marietta River Lagoon across from the NASA launch pads and is a popular point for visitors and special ceremonies. The latter Marietta County park project provided public access to an exclusive area of waterfront and redevelopment of an abandoned college campus (brownfield) into a recreational park with water play area, a community event venue featuring a renovated historic mansion, natural preserves and Indian midden.

Mr. Doe has since left Somerville.

Knowledge, Style, Skills, and Abilities

Mr. Doe states that he has dedicated his life to public leadership as a local government manager which simply put is making local representative democracy work and engaging the hearts and intellect of employees and citizens in the process. He states that his management philosophy is grounded within servant leadership. He states that he leads by example and regularly communicates. He states that he strives to create a workplace environment for people to excel in serving the public and where they achieve their own greatest potential. This is accomplished in an ethical environment focused on collaboration, personal autonomy and accountability where management establishes a vision and goals, articulates performance standards and sets parameters. He states that he manages daily through a coaching style of management, encouraging teamwork, and performance monitoring in order to create results aligned with their mission and a continuous emphasis on customer service and continuous improvement.

References were asked how they met Mr. Doe. They state they have known him from 15 to more than 20 years, as his supervisors and colleagues.

When references were asked to describe Mr. Doe's strengths, they state that he is a visionary who has both city and county experience. He is a fine leader, who is ethical, transparent, and inspirational. Mr. Doe gets along with everyone and is a good manager of a large staff. He delegates clearly. He has a passion for the job and champions the job.

References were asked to describe Mr. Doe's weaknesses. They state that he can be very direct, which some people do not like. If he thinks he is right, it is very hard to change his mind.

References were asked if they were aware of any personal or professional problems in Mr. Doe's background. No one knew of any problems in his background.

References were asked how Mr. Doe presents himself. References state that he is humble and honest, quiet and inspiring. He appears professional and very smart. He is an outstanding leader.

When references were asked about Mr. Doe's public speaking ability and ability to handle small groups, they say he is an excellent speaker. In small groups, he is effective.

References were asked to rate Mr. Doe's written communication skills. They say he writes very well.

References were asked to rate Mr. Doe's abilities to build consensus. References state he is very good at building consensus.

References were asked to describe Mr. Doe's facilitation skills. References state he runs retreats and designs group exercises. He is very good at facilitation. He recognized the wants of the community to build a park.

When references were asked to describe Mr. Doe's skills as a team player, they agree that he is a good team player.

References were asked to describe Mr. Doe's skills as a leader. They say he manages the organization from a high moral standard. Character matters to him. He is compassionate, ethical, with his standards for all. He gives inspiring talks and communicates well.

References were asked to give examples of where Mr. Doe exhibited a vision for the organization he manages. He exhibited a vision in Somerville in developing a park for the County and he exhibited an excellent vision of an effective organizational structure for a new western boomtown that set it off on the right footing for the future.

When references were asked to give examples of where Mr. Doe handled a crisis situation and what happened, they recall a short episode with a hostage situation in the Somerville County. He personally headed up the emergency communications center and through effective negotiation by him and others, the hostages were released unharmed.

References were asked if they would hire Mr. Doe. References state that they would.

Mr. Doe states that the reason he is interested in this position is because Able City government presents an opportunity to manage a larger organization and budget in what has been a premiere county organization in a beautiful coastal location in this State.

Mr. Doe states the reason he wants to leave his current position is although Somerville County offers an outstanding living environment in interior Florida in a world-class university setting. That said, Mr. Doe states that he is a professional manager, poised at the peak of his career expertise and earning potential, who recognizes that he offers a valuable professional skill set and record of ethical service to any public organizations in the marketplace.

Mr. Doe was asked if he had ever been terminated or asked to resign from any position and if so, what the circumstances were. No, he has never been terminated from any position.

Mr. Doe's strengths for this position, according to Mr. Doe, are:

> Thirty years of relevant experience as a professional city and county manager.
>
> Familiarity with and understanding of the difficult political dynamics and also potential synergy from appropriate economic development, environmental protection and the focus on high quality civic life.
>
> Professionalism and the ability to motivate employees.
>
> Ability to ensure both ethical conduct and accountability.

Mr. Doe states that, as far as any weaknesses he may have, he does not perceive any major weaknesses at this point in his career given his unique qualifications.

Mr. Doe was given the following words and asked to choose two that other people would use to describe him: Leader, Administrator, Doer, Project Manager, Facilitator, and Negotiator. He feels others view him as a **Leader** and **Administrator**.

Mr. Doe was given the same six words and asked to describe himself using two of the words. He views himself the same, as a **Leader** and an **Administrator**.

Mr. Doe says that his current salary is $100,000 and he has an automobile provided for his use.

We conducted a background check including motor vehicle records, credit reports, and criminal records. The information supplier indicates that there are no bankruptcy or collection items on Mr. Doe's credit record. The supplier indicates that Mr. Doe has a clean history of payments. Currently all of his accounts are up to date, with one closed by the credit grantor. Mr. Doe's criminal and motor vehicle records are clear.

At this point in our background investigation, we can find no problems of a personal or professional nature which would prevent Mr. Doe from performing the duties of City Manager for this City. At this point, we recommend that Mr. Doe be interviewed for this position.

CITY OF

OAK RIDGE, TENNESSEE

invites your interest in the position of

CITY MANAGER

OAK RIDGE — AN EXCITING OPPORTUNITY

This is an exciting opportunity to live and work in a dynamic city located between the Great Smoky and the Cumberland Mountains. The City of Oak Ridge is seeking a highly qualified individual to become its new City Manager and to replace the current City Manager who has voluntarily taken a similar position with another City. The City Council is seeking an experienced and astute individual to provide leadership and management to the City government and to interact effectively with an enlightened and involved citizenry

ABOUT THE CANDIDATE

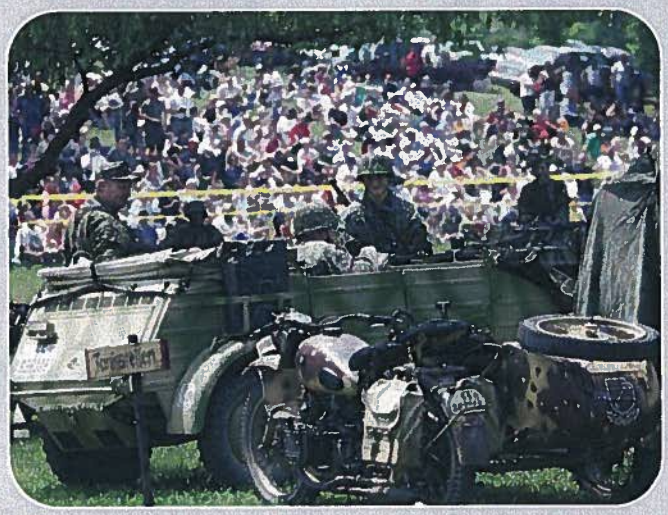
Qualifications for the Oak Ridge City Manager position include:

EDUCATION AND PROFESSIONAL DEVELOPMENT

- Requires a Bachelor's degree in Public Administration or a related field.
- A related Master's degree is highly preferred.
- • Evidence of continued professional development as evidenced by participation in professional association activities at the state and national levels and completion of seminars and workshops in the local government management field to stay abreast of changes in the field. An ICMA Credentialed City Manager would be a plus.

EXPERIENCE

- A minimum of five to seven years of increasingly responsible experience as a city manager, assistant or deputy city manager in a community of comparable size and complexity (or the equivalent public or private sector top leadership management experience).
- Experience in economic development and redevelopment.
- Experience in budgeting and finance.
- Experience in a community that hosts a DOE site, a large corporate employer, university or other large government facility would be a plus.
- Experience with the funding of a school system would be a plus.



SKILLS, KNOWLEDGE AND ABILITIES

- An individual who is fiscally and ethically responsible.
- A politically astute, forward thinking, innovative leader and visionary individual who can effectively portray the image of the City.
- A team-oriented individual who works as an effective leader of the City team.
- An effective and results oriented decision maker and problem solver with strong organizational skills.
- A manager who promotes training and development of City staff so that they may achieve their full potential.
- A high energy person who is an effective communicator both verbally and in written form.
- An individual with proven negotiating skills.
- An approachable, personable and flexible person who has a strong commitment to customer service.
- A person who respects and promotes diversity in the workplace.
- An individual who can effectively engage the talents and enthusiasms of the city staff, the public, and citizen volunteers, and who will have an open door policy with citizens and staff.
- An individual who can effectively negotiate and implement the details of agreements between the City Council and state and federal agencies.
- An individual who is up to date technologically and who appreciates the role that technology can play in improving the processes of City government.
- Someone who is able to take input from the community and act upon the identified issues.
- A person with a sense of humor who is fair-minded, calm and rational.
- A manager with experience with legislative issues at the local, state and national levels is desired.
- A manager with experience in Quality Management would be a plus.

Other attributes of the successful candidate for City Manager sought by the City Council include someone who keeps the Council informed about key issues, someone who is patient with process, someone who can tactfully say "no" when required, an open-minded, enthusiastic and energetic individual, someone who is able to establish effective relationships with a broad range of groups and individuals, someone with a "walking around sense," and an effective manager of people. Still further characteristics of the new City Manager include business management skills, a track record of successful decision making, a calculated risk taker, someone who can focus on the present with a view toward the future, someone who listens and takes ownership of issues, wants to be a partner and makes a commitment to serve the citizens of Oak Ridge.

ABOUT THE POSITION

The City Manager of the City of Oak Ridge is a professional individual who is selected by and reports to the City Council. The Council selects the City Manager on the basis of his or her training, experience, and other administrative qualifications for the office and without regard to political or religious preference or place of residence at the time of the appointment.

Duties and Responsibilities:

The City Manager shall be responsible to the City Council for:

- Administration of all units of the City government under his/her jurisdiction and for carrying out policies adopted by the City Council.
- Preservation of the public peace and health, the safety of persons and properties, and the enforcement of laws, ordinances and franchises, and the development and utilization of the City's resources.
- Appointment and removal of City employees, and administration of the merit system. He/she shall, with the advice of the Personnel Advisory Board, develop, maintain, and apply suitable provisions for the classification of positions and for the recruitment, appointment, compensation, training, promotion and disciplinary and related aspects of personnel management.
- Administration of the financial affairs of the City, including the preparation and presentation of the City budget.
- Presentation of reports and recommendations as he/she may deem desirable.
- Performance of other duties as may be prescribed by the City Charter or required of him/her by ordinance or resolution of the City Council.

The City Manager has the right to take part in the discussion of all matters coming before the City Council, but not the right to vote.

Residence in Oak Ridge will be required of the successful candidate within a reasonable period of time following appointment.

ABOUT OAK RIDGE

This is an excellent opportunity to live and work in a unique community that is rich with technology, highly skilled workers, and comfortable lifestyles.

The City of Oak Ridge, Tennessee, lies in the eastern portion of the Tennessee River Valley nestled between the Great Smoky and Cumberland Mountains. The City is located just 25 miles north of Knoxville, home to the University of Tennessee. With a population of approximately 27,500 in an area covering 92 square miles, Oak Ridge offers a high quality of life, cultural diversity, community commitment to education, natural beauty and recreational opportunities. This is a progressive, sophisticated city with an exceptional commitment to excellence.

Oak Ridge was created by the Federal Government as a secret community during World War II as a part of the Manhattan Project which developed the country's first atomic weapon. It has grown and evolved from the mid 1940's into a modern stand alone community with considerable interaction with the U.S. Department of Energy (DOE) and its contractors. Oak Ridge is at the heart of a technology corridor pioneering developments in energy and environmental research, precision manufacturing, technology transfer, and several science and technical fields. The Oak Ridge/Knoxville area is the site of more than 1,000 technology-based companies that employ 45,000 technical professionals. The area is home to more than 3,500 PhD's, and the University of Tennessee in Knoxville enrolls 27,000 students, many of whom are enrolled in the University's highly rated engineering, logistics, and business programs.

A key to this dynamic technology corridor is the partnership between the Oak Ridge National Laboratory (ORNL), the University of Tennessee-Knoxville (UT), the Y-12 National Security Complex (Y-12), and the Tennessee Valley Authority (TVA). The research and development from this collaboration puts the technology corridor at the worldwide forefront in nuclear physics, environmental technology, advance materials science, information technology, biomedical technology, transportation research, nanoscience, etc.

ORNL, currently operated for DOE by UT-Battelle, is one of nine major national labs operated nationally by DOE. ORNL conducts basic and applied research and development to improve the nation's energy sources, environmental quality, and scientific knowledge, while contributing to educational foundations and industrial competitiveness. The Y-12 National Security Complex, currently operated by B&W Y-12, is one of the premier manufacturing facilities within the national nuclear security complex. The local Oak Ridge economy is strongly linked to the DOE, which occupies about 33,000 acres within the City's limits in 1,000 buildings and employs about 13,000 persons.

No matter the age or ambition of the student, educational opportunities in and around Oak Ridge are highly regarded. The Oak Ridge School System is highly recognized for its educational programs and its students and teachers yearly receive numerous honors. The school system was named one of the top 100 school systems in the United States, second in the South, by the Wall Street Journal's Offspring magazine. Since 2003, Newsweek magazine has ranked Oak Ridge High School as one of the top high schools in the nation based on number of graduating seniors taking Advanced Placement courses. Since 1998, Expansion Management magazine's 2000 Education Quotient, which examines school districts across the nation, lists the Oak Ridge School System as the only Tennessee School system receiving the Gold Medal designation every year as one of the nation's top performing school systems.

The school system's 4,800 students are enrolled in one high school (grades 9–12), two middle schools (grades 5–8), and four elementary schools (K–4). Oak Ridge High School (ORHS) is a comprehensive public high school with an enrollment of approximately 1,500 students. Approximately 90% of seniors indicate that they plan to continue their education at the post-secondary level. The total certified staff at ORHS numbers 118, with 80% holding advanced degrees.

Colleges and universities in the Oak Ridge area include Roane State Community College, with a campus in Oak Ridge, Pellissippi State Technical Community College, Knoxville College, and the University of Tennessee-Knoxville.

Highways bring more than 70 percent of the U.S. Marketplace within a day's drive of Oak Ridge. The City is served by Interstates 40, 75, and 81, and four state highways. The City receives scheduled air service from several major airlines through Knoxville's McGhee Tyson Airport, less than 30 miles away.

Housing costs in Oak Ridge generally range from $50,000 to $500,000. Well-built houses from World War II that have been remodeled and renovated for modern conveniences dot the hillsides of Oak Ridge. New housing developments are steadily being built in the area, many of which include units with sustainable energy designs such as Energy Star or LEED certified housing. For golf enthusiasts, there are excellent homes located in Oak Ridge's golf-course communities. There are also condominiums, rentals, and assisted living facilities available.

Beginning in March 2009, Oak Ridge became the first city in the Southern United States to implement an innovative recycling program called RecycleBank. Under this program, residents can recycle mixed paper, mail, magazines, phone books, cardboard, plastics, glass, metal/aluminum cans, and newspaper in a single recycling cart that can be rolled to the curb and emptied weekly by the City's refuse contractor. RecycleBank is a rewards program that encourages residents to recycle by awarding points based on the volume of recyclable materials produced by their households. The points are deposited directly into the household's personal account which can be tracked online and redeemed at dozens of local and national businesses. This program has dramatically increased curbside recycling by Oak Ridge residents.

Oak Ridge residents enjoy a moderate climate with four distinct seasons. Long periods of extreme heat or cold are rare. Throughout the City, parks and recreational opportunities abound, contributing to the quality of life. For sports enthusiasts, indoor and outdoor activities include golf, tennis, soccer, racquetball, rowing on an internationally renowned course, and swimming in one of the largest outdoor pools in the Southeast.

With 16 parks and 1,282 acres of parkland, Oak Ridge has 46 acres per 1,000 people, well above the national standard of 10 acres and an average of 17 acres from benchmark cities surveyed recently. The city has 1,336 acres of greenbelt, areas left in their natural state, different from greenways where trails are developed. Greenways range from simple dirt walking trails, where hiking, birding, and viewing wildflowers are attractions, to paved pathways like the one on Melton Lake Drive. Most follow scenic routes that are natural corridors, preserved for outdoor recreational use. Oak Ridge has 10 greenways with 30 miles of trails.

The Great Smoky Mountains National Park is less than an hour away, with hundreds of miles of hiking trails. Rivers nearby offer opportunities for rafting, fishing, swimming, and boating.

Oak Ridge has a diverse collection of cultural activities, including a symphony orchestra, civic ballet, an art center, and a community playhouse.

The Methodist Medical Center of Oak Ridge is a 301-bed regional medical center serving an area that includes nearly 200,000 people in Tennessee and Kentucky. Doctors trained in more than 30 specialties ranging from open heart and neurosurgery to orthopedics and vascular care provide care. The staff of the Methodist Medical Center represents one of the highest percentages of board-certified physicians in the region. Overall service measures related to physician and nursing care, pain control and cleanliness all rank better than both state and national ratings through U.S. Department of Health and Human Services Hospital Compare website.

ABOUT THE OAK RIDGE CITY GOVERNMENT

Incorporated in 1959, the City of Oak Ridge operates under a modified City Manager-Council form of government with a Home Rule Charter. Seven at-large City Council members are elected for four-year staggered terms. The City Council elects a Mayor and Mayor Pro-Tem from among its members to serve for two-year terms. The current City Council works together as a team in a highly effective manner.

The City Council appoints a chief administrative officer who is the City Manager and who serves at the pleasure of the Council. The previous City Manager left on good terms to accept a position in another city.

Oak Ridge is a right-to-work, full-service City that employs a total of 388 regular staff members with an additional 76 temporary and seasonal employees. The City operates its own electric utility. City Department Heads and many City staff members have significant tenure and are highly skilled professionals in their respective positions.

The FY 2010 budget totals $179,316,041 of which $127,739,861 is under the direct control of the City. The balance of $51,576,180 is appropriated for the Oak Ridge School System which makes up only a percentage of the total School System budget. The City Council has bottom-line approval of the school budget, with the City providing significant operating funds through an operating transfer from the City's general fund. The general fund total budget is $39,849,917 which includes municipal expenditures and operating transfers. The transfers include $13,980,802 in operational funding for the Oak Ridge School System. Projected expenses are $76,551,626 in the Enterprise Funds (Electric, Waterworks, Emergency Communications District, and Golf Course Funds). Oak Ridge has an Aa3 Moody's bond rating and an AA Standard and Poors bond rating.

There is a Charter Review Commission currently undertaking a review of the City Charter. It is uncertain what may come of that review, but a change in the Council-Manager form of government is highly unlikely.

Current goals of the City Council include:

- A more informed citizenry.
- Getting Oak Ridge's message (technical know-how, quality of life, etc.) into the minds of location decision-makers, prospective residents, local residents, and other key audiences.
- Becoming more resourceful in obtaining funding to meet the City's needs.
- Reduced costs/Increased efficiency.
- Making the city's older housing stock attractive to new residents.
- Increasing all housing choices and sales.
- Reducing crime in the City of Oak Ridge.
- Having a working legislative agenda for Federal and State levels.
- Increasing public awareness of recreational opportunities.
- Configuring/Reconfiguring the City's physical infrastructure to provide a safe and accessible pedestrian and bicycle connectivity through all neighborhoods and to and between all schools, retail centers, key City facilities, parks, playgrounds, major workplaces, Haw Ridge, and similar nodes.
- Exploring options for enhanced customer service delivery.
- Improving Council and Staff attitudes toward our customers/reducing anxiety both ways.
- Providing opportunity for citizens to become life-long learners.
- Enhancing communication with educational organizations.

Significant issues currently facing the City of Oak Ridge include:

- Maintenance of a competitive property tax rate while continuing to provide the superior level of services currently enjoyed by the citizens of Oak Ridge.
- Redevelopment of the center city, including the shopping facilities and pockets of substandard housing.
- Partnering with DOE in the modernization and reindustrialization of DOE facilities.
- Development of affordable housing.
- Replacement of aging infrastructure, much of which was built in the 1940's for a temporary city.

COMPENSATION

The starting salary for the new City Manager of Oak Ridge will be market competitive, depending upon the experience and qualifications of the selected candidate. The successful candidate will also receive an automobile allowance and a competitive fringe benefit program. Reasonable relocation expenses will also be provided to the successful candidate.

HOW TO APPLY

For additional information on this outstanding opportunity, please contact James L. Mercer, President, The Mercer Group, Inc. at 770-551-0403; jmercer@mercergroupinc.com.

Resumes should be sent by close of business June 4, 2010 to:

The Mercer Group, Inc.
Consultants To Management

James L. Mercer, President
The Mercer Group, Inc.
5579B Chamblee Dunwoody Road, #511
Atlanta, GA 30338

Voice: 770-551-0403
Fax: 770-399-9749
E-Mail: jmercer@mercergroupinc.com
Website: www.mercergroupinc.com

In accordance with the Tennessee Open Records law, all application materials are subject to public disclosure. Please contact Mr. Mercer if you have questions about this law and its requirements.

The City of Oak Ridge is an Equal Opportunity Employer. The City of Oak Ridge does not discriminate on the basis of race, color, religion, creed, sex, age, marital status, national origin, political ideas or disability in employment or the provision of services.

S. RENÉE NARLOCH
& ASSOCIATES
PROFESSIONAL EXECUTIVE RECRUITMENT

A PROPOSAL TO CONDUCT

EXECUTIVE RECRUITMENT SERVICES

FOR THE

CITY MANAGER

ON BEHALF OF THE

CITY OF DUBLIN, OHIO

City of
Dublin
OHIO, USA

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

1102 S. Austin Ave 110-295, Georgetown, TX 78626
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infotx@srnsearch.com

www.srnsearch.com

S. RENÉE NARLOCH
& ASSOCIATES
PROFESSIONAL EXECUTIVE RECRUITMENT

July 14, 2014

Mayor Michael Keenan and
Members of the City Council
c/o Mr. Tim Wagner, Director of Human Resources
City of Dublin
5200 Emerald Parkway
Dublin, FL 43017

Dear Mayor Keenan and Council Members:

We appreciate the opportunity to provide the City of Dublin 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 Dublin, 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, including Ohio. Her career in public sector recruitment spans over 25 years, during which time she has participated in hundreds of public sector searches nationwide.

- 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 City of Fort Lauderdale, FL (City Manager; City Attorney; Building Official); Town of Palm Beach, FL (Town Manager); City of Oak Creek, WI (City Administrator); City of Topeka, KS (City 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); Sedgwick County, KS (Human Resources Director; Health Department 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 Dublin. 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

2910 Kerry Forest Pkwy D4-242, Tallahassee, FL 32309 ◆ T 850.391.0000 | F 850.391.0002

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ABOUT US

OUR UNDERSTANDING OF THE REQUEST FOR PROPOSAL

S. Renée Narloch & Associates is highly qualified to assist the City of Dublin in the recruitment of the new City Manager. We understand the City's scope of services outlined in the Request for Proposal and are able to successfully perform each task listed. 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 Dublin. 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

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 Dublin 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.

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 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 City of Fort Lauderdale, FL (City Manager; City Attorney; Building Official); Town of Palm Beach, FL (Town Manager); City of Oak Creek, WI (City Administrator); City of Topeka, KS (City 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 Dublin. A sample of her recent past clients is included in our proposal (Clients, Page 7). She will be assisted by other senior staff members, as outlined in this proposal (The Team, Page 6).

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 Dublin has a quality group of finalists from which to select the new City Manager.

Small Business/Minority Business

S. Renée Narloch & Associates is by federal and most 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.

OUR RECRUITMENT PROCESS

S. Renée Narloch & Associates' unique, client-driven approach to executive search will ensure that the City of Dublin 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 City 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 Dublin. 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 Dublin.

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.

THE TEAM

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 Dublin, 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.

CLIENTS

S. Renée Narloch & Associates' recruiters have extensive experience, placing more than 400 public sector professionals. Below is a list (by date) 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 Topeka, KS
REFERENCE:	Mayor Larry Wolgast 215 SE 6th Avenue, Topeka, KS 66603 (785) 640-2463 or (785) 272-6896; lwolgast@cox.net
POSITION:	City Manager
CLIENT:	City of Oak Creek, WI
REFERENCE:	Mr. Larry Haskin, City Attorney City of Oak Creek 8640 S. Howell Avenue, Oak Creek, WI 53154 (414) 762-5105; lhaskin@haskinbook.com
POSITION:	City Administrator
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

COST PROPOSAL

PROFESSIONAL FEE AND EXPENSES

The professional fee for conducting this recruitment on behalf of the City of Dublin is $14,500, plus actual expenses. Services covered by the fee consist of all steps outlined in this proposal, including three (3) days of meetings on site. Expenses are estimated to not exceed $7,500 and 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 Dublin.

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.

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 City 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 City staff and others involved in the process
15	Candidates interview with the City, follow-up interviews, and consultant reference/background checks
16	Candidate selected

S. RENÉE NARLOCH
& ASSOCIATES

SAMPLE BROCHURE & AD

Ms. S. Renée Narloch has over 25 years of public sector recruitment experience, including conducting more than 400 searches for a variety of clients nationwide.

In the last 30 days, Ms. Narloch transitioned from Senior Vice President of Recruitment of a national public sector search firm for the last 10 years to become the owner and Chief Executive Officer of her own small, minority-owned (woman) search firm.

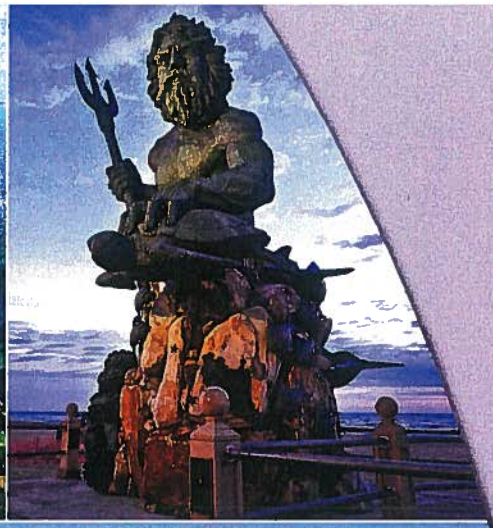
As requested in the City's RPF, attached is a sample recruitment brochure and a sample advertisement created by Ms. Narloch for one of her former clients. These serve as samples of the professional materials Ms. Narloch will produce on behalf of the City of Dublin for the City Manager recruitment.

S. RENÉE NARLOCH
& ASSOCIATES

SAMPLE AD

Below is a sample advertisement from a recruitment conducted by Ms. Narloch.

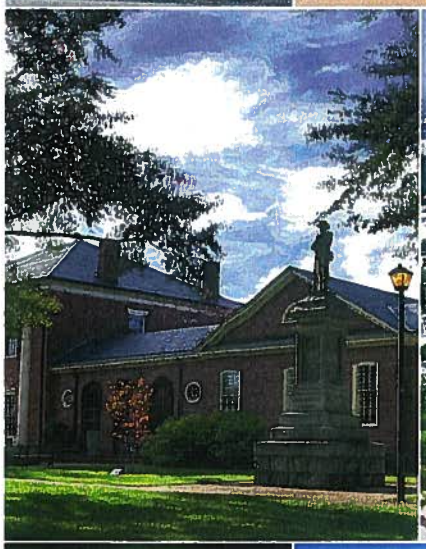
City Manager - City of [redacted], FL (pop. 185,000)
Located along the beautiful, pristine southeast coast of Florida between Miami and Palm Beach, the City of [redacted] is the 7th largest city in Florida and the largest of Broward County's 31 municipalities. A diverse and vibrant community, [redacted] is the county seat and has a strong economy and exceptional amenities which contribute to its overall excellent quality of life. The City is seeking a City Manager to oversee the day-to-day operations. The City has approximately 2,500 full-time staff and a total budget of $612 million, including a General Fund of $324 million. The City Manager is appointed by the City Commission which consists of the Mayor and four District Commissioners and is responsible for 16 city departments which include the City Manager's Office, Building, Business Enterprises, Economic Development, Finance, Fire-Rescue, Human Resources, Information Systems, Office of Professional Standards, Parking and Fleet Services, Parks and Recreation, Planning and Zoning, Police, Procurement Services, Public Information and Public Works. A visionary leader with a collaborative management style and excellent interpersonal and communication skills is needed. The ability to align the agency to meet the challenges of the future and to look at the organizational paradigms with a fresh perspective is priority. A solid understanding of sound financial practices and principles is imperative. Experience in strategic planning, performance measurements, benchmarking, budgeting for outcomes, and union negotiations is desired. A Bachelor's degree with an emphasis in public or business administration is required; a Master's degree is preferred. Candidates should have at least ten years of experience in public administration, preferably with a municipality of similar size and complexity. The salary range is open, dependent upon qualifications. First review of applications will take place on March 15, 2014; position is open until filled. If you are interested in this outstanding opportunity, please apply online at www.xxxxx.com. Contact S. Renee Narloch, Senior Vice President, XXXXX, at (850) 391-0000 or reneen@xxxxx should you have questions. A detailed brochure is available. The City of [redacted] is an Equal Opportunity/ADA Employer. Pursuant to Florida's open records law, the application/resumes are subject to public disclosure.

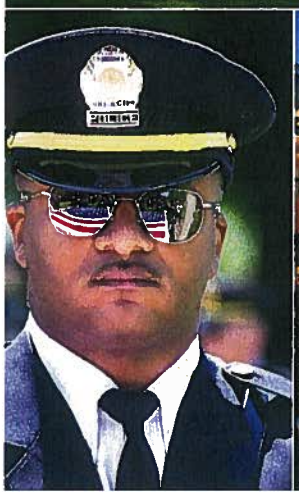


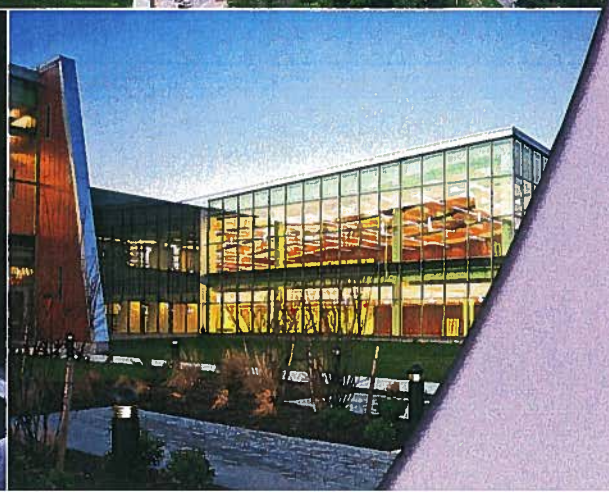
CITY OF VIRGINIA BEACH, VIRGINIA

INVITES YOUR INTEREST IN THE POSITION OF

DEPUTY CITY MANAGER







& ASSOCIATES

EXPERTS IN EXECUTIVE SEARCH

The City of Virginia Beach is a full-service city in Southeastern Virginia along the Atlantic Ocean.

THE COMMUNITY

The City of Virginia Beach is a full-service city in Southeastern Virginia along the Atlantic Ocean. It covers the entire eastern border of Virginia south of the Delmarva Peninsula, including all of the area from the Chesapeake Bay to the North Carolina border. The city encompasses 310 square miles with 38 miles of shoreline on the Atlantic Ocean and Chesapeake Bay. It is the most populous city in the Commonwealth of Virginia with approximately 439,000 residents and is the 39th largest city in the United States and the largest resort city in the world. Virginia Beach is part of the Virginia Beach-Norfolk-Newport News, VA Metropolitan Statistical Area (MSA), commonly known as Hampton Roads, which is the 38th largest in the United States, with a population of over 1.67 million.

Virginia Beach is a resort city with miles of beaches and many hotels and restaurants along its oceanfront. It is home to several state parks, several long-protected beach areas, three military bases, several large corporations, two universities, and numerous historic sites. The City was named one of the 50 best cities in the United States by *Bloomberg Businessweek*, and Virginia was recently ranked number one in *Forbes'* "Best States for Business 2013."

The City of Virginia Beach has an extremely well-educated population. Nearly 72% of the City's residents have either some college experience or an advanced degree, compared with only 58% of the national population. Virginia Beach offers excellent, nationally recognized public schools, as well as several private and independent schools. Opportunities for higher education are readily available at several local institutions including Regent University, Atlantic University, Old Dominion University, Norfolk State University, University of Virginia and Virginia Tech satellite campuses, Tidewater Community College, Virginia Wesleyan College, and additional institutions of higher education located in other communities of greater Hampton Roads, including the College of William and Mary.

Virginia Beach's economy is primarily based on tourism, the military, and agribusiness. Major employers include Amerigroup, the Christian Broadcasting Network, GEICO, VT Group, Blessing International, Navy Exchange Service Command, and Stihl (American headquarters). Virginia Beach was ranked at number 45 on Forbes list of best places for business and careers. The City's 2.75 million visitors generate $857 million annually, providing the City with $73 million in revenue. The City is home to several U.S military bases, and it's agribusiness produces an additional $80 million for the city's economy. The unemployment rate of 5.3 percent is one of the lowest in the state and considerably lower than the national rate of 7.3 percent (October 2013). The median household income for a family in Virginia Beach is $58,568 (2011 Data).

Norfolk International Airport serves as the primary air transportation hub for Hampton Roads and Northeast North Carolina. It is served by American, Continental, Delta, Southwest, United Express, and US Airways. Nearly 100 nonstop flights depart daily to destinations including Washington DC, Atlanta, Chicago, Dallas, New York, and Orlando. Residents of Virginia Beach travel from the Newport News-Williamsburg International Airport to destinations across the country. About 45 minutes from Virginia Beach, it is served by Allegiant Airlines, Frontier Airlines, and US Airways. Virginia Beach is also home to the Port of Virginia, which currently stands as the third largest container port on the East Coast.

The City of Virginia Beach is about a three-hour drive to Washington, D.C. and within a day's drive or less from two-thirds of the U.S. population. It is linked to national markets by one of the country's most modern interstate and highway systems, including I-64, the major east/west interstate connecting the East Coast to the Mississippi River corridor, and only two hours from I-85 and I-95, major north/south interstate highway corridors serving the East Coast. Virginia Beach is also home to the 17.6-mile Chesapeake Bay Bridge-Tunnel, the longest bridge-tunnel complex in the world, which connects Virginia Beach with Virginia's Eastern Shore and points northward via U.S. Route 13.

Virginia Beach's racial diversity consists of: 69.1% White; 20.0% Black; 7.2% Hispanic; and 3.7% Other (U.S. Census, 2012 estimate).

The regional climate is subtropical, a climate zone characterized by hot summers and cool winters. The mean annual temperature is 59.6 °F, and the wettest seasons are the spring and summer, although rainfall is fairly constant all year round. Virginia Beach's geographic location, with respect to the principal storm tracks, is especially favorable. It is south of the average path of storms originating in the higher latitudes, and north of the usual tracks of hurricanes and other major tropical storms.

The region offers a variety of housing options, quality healthcare, learning opportunities, recreational activities, and many retail and restaurant options, all of which contribute to its excellent quality of life.

THE ORGANIZATION

The City of Virginia Beach was incorporated in 1963 and has a council-manager form of government. The governing body of the city is the City Council, which formulates policies for the overall direction of the city. The Mayor and three City Council members are elected at-large and seven Council members are elected by Districts in which they must reside, although all voters can vote in all District elections. Council members and the Mayor are elected to serve four-year overlapping terms. The City Manager is the Administrative leader of the municipal government and carries out the policies of the City Council. The City Manager is appointed by and serves at the pleasure of the City Council to oversee the agency's 25 departments. The 2013 annual operating budget is $1.7 billion, and the City employs a workforce of approximately 7,100.

THE POSITION

This Deputy City Manager position is responsible for several departments including Agriculture, Economic Development, Museums and Historic

Preservation, Convention and Visitor's Bureau, Housing and Neighborhood Preservation, and Planning. The position also supervises the Office of Cultural Affairs and Strategic Growth Area Office. The position is one of three Deputy City Managers reporting to the City Manager.

As an integral member of the Management Leadership Team, the Deputy City Manager aids in the realization of the City Council's vision; ensures efforts are aligned and integrated in the organization; improves organizational performance, and maximizes effectiveness. The position provides support to the City Manager and Council by planning and recommending policies and performance strategies; functions as a team member/leader and works in collaboration with other Deputy City Managers keeping the Manager informed; develops action plans as needed; assists Department Directors as necessary with operational decisions; ensures practice of Completed Staff Work (CSW) to ensure quality customer service and to optimize use of the organization's resources; sets priorities and leads in planning, organizing, and accomplishing work; ensures alignment of work with the outcome strategies; communicates mission, vision, and strategies of the City throughout the departments/units; and acts for the City Manager in the absence of the Manager, when assigned. In addition to organization-wide duties, the Deputy City Manager provides direct supervision of assigned departments, offices, and programs, and ensures coordination among all departments.

Responsibilities of the Deputy City Manager include, but are not limited to:

- Participates with City Manager and Council in accomplishing Council's vision and strategies for achieving the Community for a Lifetime.
- Represents and supports the City Manager with City Council, with individual, member and group discussions. Monitors the pending items list and keeps City Council informed about projects and issues of importance to Council. Provides staff support for Council/ Departmental issues and provides liaison support as needed.
- By example, fosters a pro-active inclusive environment where all levels of staff anticipate, develop, and provide services valued by citizens and those required by code and charter.
- Oversees development of human resources, including volunteers, through effective management practices (e.g., coaching, delegation, and rewarding member successes).
- Provides direct oversight and supervision of programs and operations of assigned departments and offices, working to resolve interdepartmental issues as necessary.
- Ensures decisions relating to common resources are made in collaboration and in acknowledgment of their impact on the entire organization.
- Works to assure the resolution of issues impacting multiple departments irrespective of organizational origin.
- Provides effective leadership to achieve desired outcomes in concert with process management guidelines.
- Ensures organizational accountability (e.g., through demonstrated systems thinking, issues and trends identification, and effective resolution).
- Supports City Manager and Council through completed staff work.
- Advocates City, Federal, State, and regional cooperation where opportunities exist to further the City's and region's goals.
- Coordinates workforce planning, and learning and development to meet current and projected needs.
- Plans and creates learning opportunities in partnership with members by creating an environment conducive to learning at all levels.
- Deals directly with City Manager both individually and as a group, with City Council to assess City needs and formulate action items.
- Actively communicates with all other Chief Officers in support of integration and alignment of organizational results.
- Challenges departmental leadership to work and communicate across traditional functional boundaries.
- Facilitates effective communications throughout all levels of the organization and with Council and the public.
- Creates effective links and relationships with the media, community groups, and various constituencies.
- Facilitates the exchange of ideas and information between the city organization, employees, and the community.
- Identifies, develops, and proposes internal (city) and external (community) issues for review and/or action by the city.
- Ensures that Council's vision, organizational values, and strategies, and the City's mission are clear and executed by members at all levels of assigned departments and offices.

The City of Virginia Beach seeks a knowledgeable, professional leader of excellent reputation with strong administrative skills.

Preferred qualities and traits of the Deputy City Manager include:

- Supports and encourages positive innovation.
- Understands, values, and promotes diversity.
- Thinks strategically and creatively.
- Develops methods to change and improve performance.
- Designs and implements change processes (e.g., builds group decision-making processes).

- Facilitates organizational learning to ensure continuing improvement in City programs and operations.
- Promotes, encourages and leads collaboration in seeking new ways to share resources, best practices and ideas in order to optimize services delivery organization-wide.

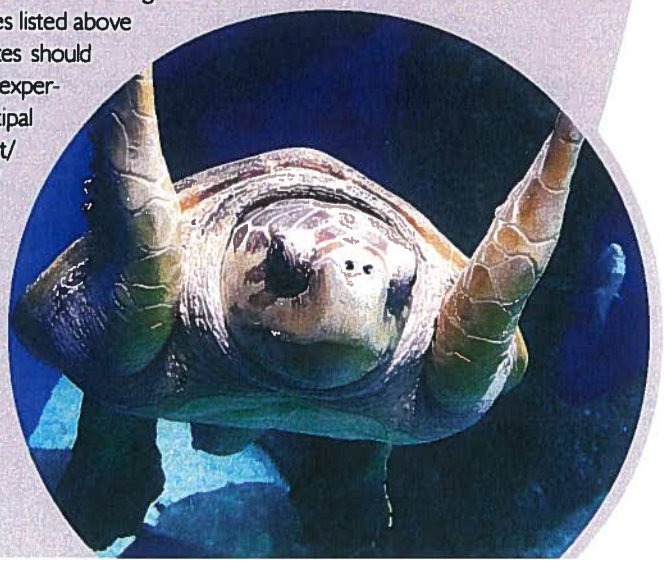
THE IDEAL CANDIDATE

The City of Virginia Beach seeks a knowledgeable, professional leader of excellent reputation with strong administrative skills. The Deputy City Manager should be able to enact change and promote measures specifically designed to increase overall organizational efficiencies and effectiveness, as well as advance initiatives that support the City Council's goals and objectives.

The successful candidate will have thorough knowledge/understanding of the City Governance Model and its application; of the concepts, principles, practices, and techniques of modern public administration as applied to municipal government; and of the City's Core Strategies and Quality Management concepts and practices, their application, and how to gain full commitment of assigned staff. Knowledge of local, state, and federal laws, regulations, and procedures applicable to a municipal corporation, as well as the preparation/execution of municipal budgets is a priority. The selected candidate will have the following skills: strategic planning; motivating and empowering staff; developing and implementing changes; planning, organizing, and completing staff work in a timely and quality manner; and working with other managers and gaining their commitment on programs that address and enhance organizational values. Must also be able to organize, present, and respond to inquiries on a wide range of routine and sensitive programs, projects, and topics in both oral and written form, and including such forums as public hearings and meetings with groups representing diverse opinions with the potential for confrontations and emotionalism; as well as make formal presentations to the City Manager and Council.

The Deputy City Manager must have the demonstrated ability to effectively lead multiple City departments/units, programs/operations, and a large, diverse work force; to advocate/lead in the recognition and implementation of changes that ensure provision of aggressive and cost effective public service programs; to lead others to lead themselves; to communicate technical and professional data effectively to citizens and employees with diverse educational backgrounds; and to establish and maintain effective working relationships with other city officials and employees to achieve the broader/larger organization goals. A demonstrated aptitude for active listening, negotiations, problem-solving, and delegation is important. The challenges facing the City including strengthening and diversifying the local and regional economy by attracting other types of industries; therefore, the preferred candidate must have the ability to develop solid relationships with the economic development community and various stakeholders. A proven leader with a team-oriented management style is needed.

A Bachelor's degree from an accredited college or university in Public Administration, Government Operations, Business Management, or a closely related field is required; a Master's degree is preferred. A combination of higher-level education and experience equivalent to fourteen (14) years in fields utilizing the knowledge, skills, and abilities listed above is also acceptable. Candidates should have at least eight (8) years of experience as a higher-level municipal executive, such as Assistant/Deputy City Manager of similar sized agencies or City Manager of a smaller organization.



THE COMPENSATION

The salary range is $117,975-$176,963 annually, commensurate with experience. The City offers an excellent benefits package which includes health, dental, and life insurance; retirement and savings plans; holidays, annual, and sick leave; as well as access to the Beach Municipal Federal Credit Union, a non-profit service agency which is owned and operated exclusively for City employees and their dependents.

TO APPLY

If interested in applying for this outstanding opportunity, please visit our website at www.[redacted] and follow the prompt to create a profile and apply online.

First review of applicants will occur on February 10, 2014.

Resumes will be screened according to the qualifications outlined above. The most qualified applicants will be invited to screening interviews with [redacted]. A select group of candidates will then be asked to provide references on determination that they may be recommended as finalists; references will be contacted only following candidate approval. Final interviews will be held with the City of Virginia Beach. Candidates will be advised of the status of the recruitment after the selection of the Deputy City Manager.

Questions regarding this recruitment may be directed to Ms. Renée Narloch, Senior Vice President, at info@[redacted] or call:

850-391-0000

The City of Virginia Beach is an Equal Opportunity Employer.

To learn more about the City of Virginia Beach visit:

http://www.vbgov.com

and

http://www.yesvirginiabeach.com

[redacted] & ASSOCIATES

EXPERTS IN EXECUTIVE SEARCH

affion PUBLIC | Delivering Leaders

We deliver leaders. Our executive recruiting specialists have national contacts within the public sector and professional organizations – allowing us to find a broad range of talent. We rigorously qualify and investigate each candidate. We won't just pull names out of a database. When we are finished, you will have candidates that meet or exceed your expectations.

affion PUBLIC

Corporate Office:
2120 Market Street, Suite 100
Camp Hill, Pennsylvania 17011

Texas Office:
901 Lakeshore Circle
Point Venture, TX 78645

www.affionpublic.com
888.321.4922 toll free
717.214.8004 fax

07/18/2014

Anne Clarke, Clerk of Council
City of Dublin Municipal Building
5200 Emerald Parkway
Dublin, Ohio 43017

Dear Anne:

Thank you for the opportunity to submit our offer of executive search services for the City Manager position.

Affion Public is an executive search firm that specializes in identifying and placing exceptional executive level candidates within the Public Sector. We have built a successful practice on placing Public Sector executives and have a reputation for developing excellent working relationships with the clients we serve.

Our partnership approach and high quality of work fosters the level of comfort our clients' value. With our high touch style, we will be able to provide you with the attention that you warrant and deserve for this very important search. Our search process and collaborative approach has enabled Affion Public to conduct multiple searches for the majority of the clients we serve.

We differentiate ourselves from our competition by seeking out passive, as well as, active candidates that will best meet the needs of our clients. By conducting searches in this manner we are able to provide a tailored pool of candidates rather than recycling the same candidates search after search. Our commitment to diversity and success at targeting minority candidates has also helped to set us apart from other firms.

On behalf of Affion Public, we will be thrilled to be your firm of choice! Please feel free to contact me directly at 512-742-7590 or via email at nuse@affionpublic.com. I look forward to speaking with you in the near future.

Best Regards,

James R. Nuse

Jim Nuse
Vice President, Affion Public

Delivering Leaders.

City of Dublin, OH
Executive Search Services
City Manager
07/18/2014

Affion Corporate Office:
2120 Market Street, Suite 100
Camp Hill, PA 17011
888-321-4922
www.affionpublic.com

Texas Office:
Affion Public, LLC
501 Lakeshore Circle
Point Venture, TX 78645

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Affion Disclaimer
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Company Profile

Affion Public is deeply rooted in the public sector, providing technology consulting and human resources consulting and strategies for state and local government, education and non-profit organizations since 2000.

Affion Public brings extensive experience and expertise to every assignment by providing comprehensive human resource and technology consulting strategies. Whether it's finding the perfect candidate for a key position, providing classification and compensation or assembling a seasoned team of technology operations people to tackle a tough problem, Affion Public has the solution.

Our Executive Search Division specializes in identifying the nation's best and brightest executives, and delivering those individuals to our Public Sector Clients. Our Partners are typically state, county, city, and government organizations as well as non-profits. Recognized as a leader in public sector executive searches, Affion has attained "preferred" vendor status or an exclusive relationship with the majority of its client partners.

Affion's corporate headquarters is located at 2120 Market Street, Suite 100, Camp Hill, PA 17011 and our Texas office is located at 501 Lakeshore Circle, Point Venture, TX 78645.

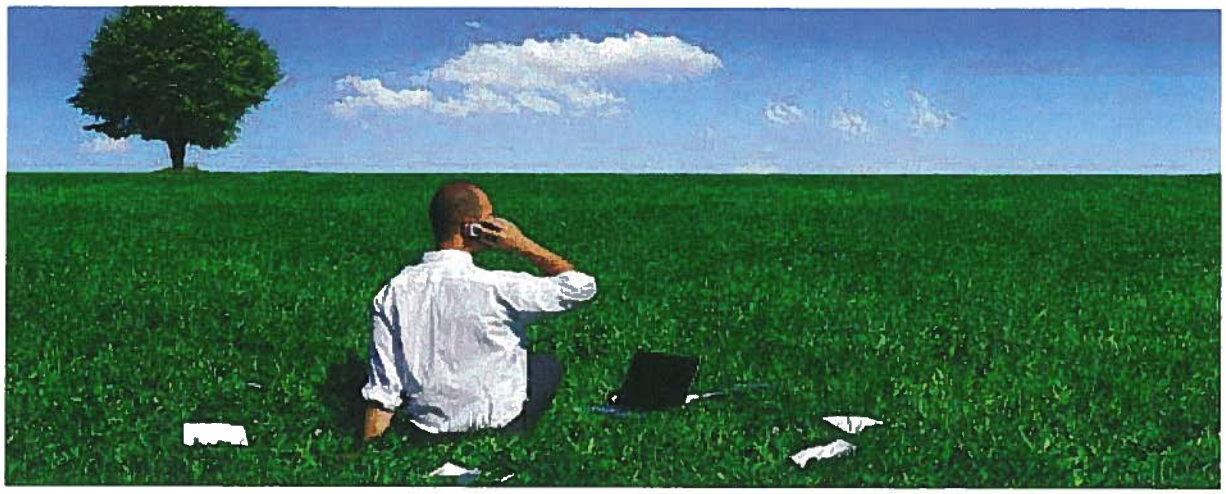
Why Affion?

We are different. As a company, our strengths lie in our people, our passion, and our commitment. Affion employs an extremely talented group of professionals that bring a diverse set of skills and an average of over 10 years of experience in government and private sector venues. Extraordinary, trusted client partnerships have separated us from others in the industry. Embracing a small business approach has enabled the entrepreneurial spirit of Affion, while also ensuring a personalized approach and customized solution for our partners.

It is our unique understanding of the complexities of the public sector that gives us an edge. We know what to challenge potential candidates on, and we know how to discern and qualify the very specific set of skills an executive needs in order to succeed within the public realm. Our particular expertise lies in our ability to reach out to and ultimately attract the best and the brightest into the public executive domain. Short and long term, Affion is looking for valued, long lasting partnerships, where we can have a real and positive effect for our client.

Our Public Sector Team provides a full range of customized executive recruiting and management consulting services. Particular areas of expertise lie within strategy, human resources, process and solutions. We have served in an advisory capacity to state, city, and municipal governments across the country.

Historically, our specialized executive recruitment services have been client driven. By building strong client partnerships, and practicing due diligence, we gain an invaluable understanding of the mission, motivation and culture of our client. This has allowed us to successfully recruit across all departmental disciplines and ultimately to provide top executives to an array of governmental agencies and authorities (e.g. Information Systems, Public Safety, Engineering, Health and Human Services, Water Utilities, Economic Development, Assistant City managers, City Managers, etc.).



What We Do Differently

Our executive search goal is to specify, identify, qualify and deliver candidates that meet or exceed your expectations. After consulting with client executives and stakeholders, we utilize a systematic search methodology to customize and tailor the ideal candidate and position profile to meet the specified need.

Targeting organizations that are similar to our client, we set out to find individuals that meet and exceed the background, education, experience, and personal characteristics required. This is done in a highly confidential manner and in compliance with applicable legal standards. Once a potential candidate has been identified, they will enter into a rigorous qualifying process to further establish the "fit". A comprehensive Confidential Report on each of the selected candidates is prepared to include pertinent information relative to the candidates work history and background. A professional appraisal of the candidates' competencies compared to the specific requirements will be provided as a continuum to the Report. In the form of a Portfolio Presentation, we meet with the stakeholders to make our recommendations. We deliver individuals that are competent, qualified, and capable. We deliver solutions.

Relevant Recruitment History:

City of Ann Arbor, MI
(population 113,934)
- City Administrator (2011)

City of Austin, TX
(population 885,400)
- City Manager (2008)

City of Broken Arrow, OK
(population 98,850)
- City Manager (2009)
- City Manager(2012)

City of Columbia, MO
(population 115,276)
- City Manager (2011)

City of Corpus Christi, TX
(population 305,215)
- City Manager (2008)

City of East Lansing, MI
(population 48,579)
- City Manager (2012)

City of El Paso, TX
(population 674,433)
- City Manager (2014)

City of Galveston, TX
(population 48,733)
- City Manager (2012)

City of Hollywood, FL
(population 146,526)
- City Manager (2012)

City of Huntsville, TX
(population 39,795)
- City Manager (2008)

City of Irving, TX
(population 228,653)
- City Manager (2006)

City of Kirkwood, MO
(population 27,540)
- Chief Administrative Officer (2014)

City of Leander, TX
(population 31,717)
- City Manager (2011)

City of Marshall, TX
(population 24,501)
- City Manager (2014 – present)

City of McKinney, TX
(population 148,559)
- City Manager (2008)

City of Morgantown, WV
(population 30,666)
- City Manager (2010)

City of North Richland Hills, TX
(population 67,317)
- City Manager (2009)

City of Plano, TX
(population 274,409)
- City Manager (2011)

City of Round Rock, TX
(population 109,821)
- City Manager (2011)

City of San Antonio, TX
(population 1,409,019)
- City Manager (2006)

City of San Marcos, TX
(population 54,076)
- City Manager (2008)

City of Savannah, GA
(population 142,772)
- City Manager (2010)

City of Springfield, MO
(population 164,122)
- City Manager (2008)

Incorporated Village of Garden City, NY
(population 22,552)
- Village Administrator (2014)

Objectives and Approach

1. **Establishing the Timeline** – we will work closely with you to determine your ideal start date for your executive and then work to make sure that we agree on all target dates and activities.

2. **Input from Key Decision Makers** – we will meet with all parties who will be impacted by this executive to seek input, which will also help us understand the company, the people and the working environment. This can include setting up Public Forums to engage the community in assisting in the process.

3. **Developing the Candidate Profile** – through extensive interviews we will gain a complete understanding of the mission and goals of the company and begin to create the profile of the executive you are seeking.

4. **Candidate Pool and Search Techniques** – we will use our own extensive internal database, our personal and professional connections, competitor intelligence, targeted recruiting, industry specific sourcing and other recruiting tools to begin to identify the perfect candidate.

5. **Screening Process** – we will conduct interviews to qualify each candidate, whether it is an internal candidate or an external one, prior to presentation to you, and will conduct an extensive background check on each potential candidate.

6. **Selecting Candidates for Client Review** – we will present the key decision makers with a portfolio of candidates for consideration and will discuss each candidate's skills and qualifications in detail.

7. **Choosing the Finalists and the Interview** – once the client has reviewed the candidates and has selected the finalists, interviews with the key decision makers or the Selection Committee will begin.

8. **Hiring** – all candidates will have been pre-qualified on the salary range, benefits and we will assist in all final employment matters.

Developing the Candidate Profile

Affion's approach to executive searches is a very personal and systematic one. Our success is dependent on the access and information granted to us by the client organization, so that we can gather all the information possible to have a true understanding of the client's needs. Only if we know the organization intimately and develop a very thorough and detailed profile of the ideal candidate, can we be assured of the right match for the organization and the individual who is ultimately selected.

We pride ourselves in the value we bring to the table by working with the client to develop the profile of the ideal candidate from which to conduct our search. We do this by spending a great deal of time with the chief decision makers, elected officials, etc. at the very beginning, learning the history of the position, the mission and goals of the Organization, the past successes and failures of the position, staff, budget and virtually everything the selected candidate would need to have experience and success addressing. In order for us to locate the ideal leader for an organization, we must know where that organization wants to go and what it will take to get it there.

Each search is different and we invest as much time in getting to know the style and organizational culture of our client as we do getting to know each candidate under consideration. We develop a strong relationship with the decision makers and people with whom the potential candidates would be working to ensure the right match. We spend time with the decision maker(s) to understand their idea of the "ideal" candidate, their own management style, and what the position means to them and to the organization. We learn and adopt the Organization's vision, so that we are able to recruit candidates who will embrace those goals and lead a strategy that will support that vision.

We prefer to interview other successful executives at the peer level of the vacant position to get an understanding of the kind of leaders who are successful in the Organization. We also find it valuable to interview some subordinate level staff, if possible, to assess some of the challenges or strengths within the current resources that the incoming executive would find.

These early stages of the search are, in our mind, the most important. Our entire search team, including our assigned recruiter(s), is involved in this information gathering/ relationship process from the beginning so we all know exactly what our client is seeking in applicants and are qualifying candidates on the client's organizational culture.

For national searches, our team also investigates the community in which the position resides. We investigate the public and private school options, and even spend time with a realtor to get a feel of the local housing market for relocation. All of this helps us when we screen and sell candidates on the position.

From the interviews and fact gathering, we will prepare a comprehensive Candidate Recruitment Profile for the position, with the desired qualifications and characteristics, for approval by the Client's designee(s). It is from this customized Profile that we conduct our systematic search.

Input from Stakeholders

The first steps in any search begin with our onsite stakeholder meetings. The purpose of the stakeholder interviews is to allow Affion an intimate understanding of the organization, the people and the environment. These interviews are how we develop the two key profiles in which the search is built around. The first profile is the position profile. The position profile includes not only the requirements the successful individual will possess but also what they will be doing on a daily, weekly and monthly basis. This profile is critical in analyzing the potential candidate's previous experience. The second profile is the candidate profile in which we spoke previously about. This profile allows Affion to define the type of individuals that will be successful in your organization.

The stakeholder meetings begin with developing the list of individuals that will be working directly with this person. This list should include whomever the individual is responsible for reporting to and anyone who may be directly involved with the hiring and interview process. Affion is committed to spending as much time as necessary on the stakeholder meeting to ensure a successful placement.

The stakeholder meetings are approximately one-hour interview session in which our team will ask probing questions to what will make the candidate successful. These are generally done on an individual basis.

Additional stakeholder meetings including public input will be scheduled at the discretion of the selection team. We have a long history of being very inclusive with our stakeholder process and often meet with community leaders, business leaders, civic and religious leaders as well as neighborhood associations.

Candidate Pool

Affion is a relationship driven, select targeting firm. We use our own internal database to draw upon potential candidates with whom we have built relationships and/or referrals. We use the telephone to reach out to referrals and candidates initially. We use the Internet as well as select research firms to investigate credit, criminal and other background checks and to obtain any written publications authored by, or regarding, the candidates. Beyond this limited use of technology, our efforts are all carried out in person. We post the job on the Internet or advertise in print as required by the client organization. Even our utilization of networks of professional or trade associations, is done in person. This personal approach is how we have been most successful in targeting and attracting the best and most diverse selection of candidates.

Each Affion recruitment effort is customized specifically to the client organization's needs and preferences. One of the additional values achieved from the time we spend in the beginning is getting to know the client organization and its culture and obtaining mutual agreement on a process that works for both of us. While we have a very strict and systematic internal qualifying/screening process, it is only visible to the client in the result it produces. Any processes external to our qualifying/screening process may be modified to accommodate the client's organizational needs.

Affion Process in Screening

While the general steps outlined herein are the basis of the Affion search, flexibility is built into our model to accommodate a particular client's preferences. Our search is customized to best meet the needs of our client and as long as we are not asked to forego steps to ensure quality, modifications or additions can be made.

Sourcing/Recruiting Candidates

Our Senior Executive Recruiters (100% dedicated to this search) will identify candidates who have been successful in like organizations in similar positions. We search from a variety of sources to ensure development of a broad representative pool in terms of affirmative action efforts and experience; including our own network of contacts and files; public or private entities, professional and other associations and organizations related to the position and referrals. We do targeted advertising in publications specific to the position.

Targeted Recruiting

Affion maintains a national database through extensive networks in industry specific business groups, trade and professional organizations. To further ensure a diverse candidate pool, we also source candidates from professional organizations and networks that are ethnic and gender specific. We reach out to a variety of sources to collectively find the best talent available.

As a result of our previous and ongoing recruiting efforts within government and quasi-government organizations, (local, city, county, and state) Affion has, and continues to build, an expansive network of candidates that includes the best and the brightest in the public sector. That network of candidates exemplifies our professional commitment to building valued relationships, knowing the individuals' experience and leadership styles, and understanding their needs and career goals. By operating within these guidelines, our deliverable to our client results in being a known and trusted entity.

Screening/Qualifying Candidates

Our Senior Executive Recruiter conducts preliminary screening interviews of all candidates and the most promising candidates to determine their qualifications, pertinent accomplishments, experience, ability to meet special needs of the position and their interest in being considered. Preliminary screening will be based on a resume rating developed from criteria contained in the customized Candidate Recruitment Profile, information contained in the resumes submitted to Affion, and Affion's knowledge of the people and organizations with whom and in which we work. At this point in the search, our recruiter is also securing preliminary, confidential reference information on the most promising candidates (as available and appropriate) to verify experience and qualifications; i.e., to ensure that it is worthwhile proceeding with them.

After qualifying the best candidates into our process, those individuals are subjected to further rounds of interviews by additional Affion Executive staff. The same criteria are used, but the emphasis here, is on organizational and cultural fit, and political acumen. This process assures the quality we demand of the short list of semi-finalists that are selected.

All candidates are met face-to-face when possible. If the face-to-face interviews cannot be arranged then video conferencing is arranged to ensure that the recruiters and executives within Affion are comfortable with the candidates they are presenting for consideration.

Background Investigation

When all members of the Affion qualifying team have agreed that the candidate fits the desired profile we begin extensive background checks to include: criminal, education, and financial investigations. Reference calls are completed. Internet and media searches are conducted. This entire procedure is intended to further eliminate unqualified candidates, and to validate the credentials of the final candidates in process.

Selecting Finalists for Promotion to Client

From our rigorous qualifying process and investigation, Affion typically narrows the field of qualified candidates to the top 6-8. We present all of the Client's designated representatives with a comprehensive book of material on each of the selected individuals. These books contain summary profiles, resumes, applications, articles by or regarding the candidate, pertinent work product, and photographs of those candidates whose qualifications, work experience, achievements, and/or other special qualities qualify them for the position. This comprehensive Confidential Report on each candidate covers not only the candidate's working career and those personal aspects that are relevant to the position, but also our appraisal of how the candidate's competencies compare to your specific needs and environment. Affion and the Client's representatives will meet to review the detailed contents of the book.

Internal Candidates

Affion always screens and evaluates those applications and resumes received by the Client from in-house or outside applicants to insure, on the client's behalf, that the process is considered fair to all applicants and to determine if any of these individuals are qualified, viable candidates. Often, at the client's preference we keep all in-house applicants in process until the final qualifying phases of the search process, unless it is clearly established that certain individuals are not qualified.

We review, evaluate and acknowledge in writing all applications and resumes received. Additionally, we ask that all solicitations for consideration made directly to the client be forwarded to Affion immediately to avoid duplication of efforts and take work off the client's shoulders.

Client Selection of Candidates for Interview

Affion would work closely with the hiring team for selecting the finalist. Affion will make a portfolio presentation to the key stakeholders which will include; the resume, a brief bio written by the candidate, a description of the candidate's strengths and weaknesses, and an answer to the questions "Why Should I be the Next..." Upon our face-to-face presentation of the finalists, with our recommendations and comprehensive background information, we require that the Client select the number and names of the candidates it wishes to interview in person.

Upon the Client's direction, Affion personnel will coordinate with Client personnel to arrange interviews with the top candidates selected for consideration. Affion will work with the client to coordinate any travel or accommodation details that may be needed for each outside candidate.

Client Interviews and Final Selection

The finalist interviews would be conducted in conjunction with the wishes of the hiring team. Affion typically suggests that the hiring team utilize panel interviews and also perhaps a candidate presentation. The candidate presentation would be an oral presentation accompanied by a visual presentation. We typically ask all candidates to prepare a twenty-minute presentation in a power-point format. This presentation can be on a topic agreed upon by Affion and the client. The purpose of this presentation is to allow the selection committee to see how the candidates communicate their thought process and the candidate's ability to effectively express those thoughts to their audience.

The formal interview would involve the same set questions asked to each candidate by the same panel member. This allows the selection committee to evaluate each candidate on a fair and equal field. These questions are agreed upon in advance with Affion and the selection committee. Affion will be involved throughout the entire interview process to facilitate the interviews.

Hiring

Once it is time for a hiring decision, Affion will provide assistance on final employment matters, such as the negotiation process with successful candidates and notification to unsuccessful candidates.

Any candidate that is presented for consideration will have been pre-qualified on the salary range, benefits and relocation package. Once the finalist has been selected it is our standard practice that the client sends a formal offer letter to Affion on behalf of the successful candidate. Affion will facilitate the signature and closing of the process.

Statement of Diversity

Diversity is one of our core values, as well as part of our heritage. It acknowledges and celebrates the richness and value created by the differences among our employees, our customers, our service offerings, and our businesses. It is about people, backgrounds, lifestyles, ideas and balance between our work and personal lives. It is about maximizing the contributions from all members of our team so that we deliver greater value to our customers. It is about valuing differences. It is not a code word for affirmative action. It is much larger than that. It is about valuing differences. It is about inclusion. It relies on standards of performance and behavior, which lead to mutual respect. Diversity is about effectively using our collective talent to create a competitive advantage that leads to success – both for our internal support staff and contract workforce. Affion is truly committed to effectively recruiting and maintaining a diverse workforce.

Affion maintains an Affirmative Action Program and policy to afford equal employment opportunity to all without regards to race, color, religion, sex, national origin, sexual orientation, handicap or disability or status as a disabled veteran or a veteran of the Vietnam War era. We take affirmative action to ensure applicants for employment and employees are treated without regard to these characteristics. The sole basis for decisions regarding employment status has been, and will continue to be, an individual's qualifications, and based only on valid, non-biased job requirements in positions being filled. To carry out our policy, the commitment includes, but is not limited to: recruitment, hiring, promotions, transfers, compensation, benefits, layoffs, terminations, educational tuition assistance and company sponsored training and recreational programs.

Affion employs responsible reporting and monitoring procedures to ensure that all personnel actions are in strict compliance with the Equal Opportunity Policy and our Affirmative Action program. We are further committed to being an Equal Opportunity Employer by various federal, state and city laws on fair employment practices. All of Affion's advertising reflects these same important standards.

We are proud of our success in ensuring a diverse candidate pool and thrilled to have placed multiple women and minority candidates in executive level municipal positions, nationwide.

Individuals Assigned to Search:

Scott Reilly
CEO, Affion Public
reilly@affionpublic.com
717-576-9847

Scott will be responsible for Quality Assurance during the length of your project. During the engagement, he will be responsible for ensuring the success of the process.

Scott, previously the Vice President of Arcus Public, has more than 20 years experience in Sales, Executive Recruiting and Technology. His depth of knowledge and experience placing top executives and technology professionals enables him to lead the talented group of professionals at Affion Public. Throughout his tenure in the public sector, he has been responsible for leading the engagement process and successfully placing more than 100 professionals in key roles. He's worked in the trenches performing the searches, as well as in leadership roles guiding his team and building relationships with clients while at the helm. He truly understands and appreciates the intricacies of the market, and as CEO for Affion Public, he is responsible for the strategic direction and approach of each of the firm's key service areas.

Scott has been a speaker/presenter on various topics nationally working with leading government officials; to help identify opportunities for technology research and share best practices as well as executive search forums. He was named a founding Honorary Alumni to the Harrisburg University of Science and Technology first graduating class. He currently serves as the vice-chairman of the Derry Township Municipal Authority and has been an active member on the Hershey Country Club Board of Governors. Scott was also recognized by the Central Penn Business Journal as one of the region's Top 40 Under 40.

Scott has been directly involved with all executive level searches through Arcus Public and Affion Public since 2003.

Jim Nuse, P.E.
Engagement Manager
nuse@affionpublic.com
512 748-7590

Jim will be dedicated to your executive search as the engagement lead. Joining the team in January 2014, Jim brings over 30 years of public sector experience to further enhance the team's ability to provide successful executive level searches.

Prior to joining Affion, Jim served as the City Manager for San Marcos, TX from December, 2010 until his recent retirement in January, 2014. In San Marcos, Jim led a team of 550 employees with an annual budget of $147.8 million. Jim also served as the City Manager of Round Rock, TX from 2002-2010, where he led a staff of 840 employees with an annual budget of $130 million. Prior to his City Manager appointment, he was the Public Works Director for 18 years. He began work for the City of Round Rock in 1983, helping it grow from a population of 13,000 to more than 100,000 today.

Jim holds a bachelor's degree from the University of Wyoming, and has completed master's coursework at the LBJ School of Public Affairs at the University of Texas at Austin. Jim is a licensed Professional Engineer in Texas.

Gina Sprowls
Recruiting Manager
sprowls@affionpublic.com
717-763-1987

Gina will manage the recruitment efforts of your executive search. During the engagement, she will provide the direction and coordination for the recruitment to ensure the profile of the ideal candidate is adhered to so the best candidate is hired for the job.

Gina will be responsible for identifying, profiling, and screening the candidates. Her role will include qualifying potential candidates and conducting interviews of candidates. Additionally, she will assist in coordinating interviews, soliciting feedback, and conducting professional reference checks. She may be involved in the presentation of the final candidates to the stakeholders for consideration.

Gina brings over ten years of diverse experience in recruitment, sales and management. She offers a strong background in Human Resources with an emphasis on executive level recruitment and training. Her recruitment career has crossed over several industries including Public Sector, Technology, Finance, Healthcare, Sales and Education. She has worked on multiple executive level searches for clients across the nation and is known for building and maintaining excellent relationships with our clients and candidates.

Gina has been directly involved with all executive level searches through Arcus Public and Affion Public since January, 2008.

Proposed Project Timeline:

Timeframe	Activity
Upon Selection	• Affion to negotiate and finalize contract
Day 1	• Facilitate a meeting to discuss timelines, recruitment process and plan for completing the Position and Candidate Profiles • Affion to meet with identified stakeholders to begin the due diligence process • Conduct Public Forums if needed • Simultaneous industry research taking place
Day 10	• Affion presents draft of Profile
Day 15	• Finalize Profile

Day 16	• Search Firm conducts recruitment to include:
	  ○ Journals, personal contacts, Websites, etc.
	  ○ Place advertisements
	  ○ Review resumes

Conducted on a weekly basis	• Progress Report—check for quality and diversity of applicants. Determine need to target any specific group or area. • Review and qualify all potential candidates
Day 46	• Affion concludes the recruitment campaign
Day 65	• Review and finalize candidate selection to be presented • References for finalists are contacted • Background checks completed • Internet and media searches conducted on finalists
Day 76	• Presentation of 6-8 candidates to the Selection Panel • Affion will facilitate a review of the final candidates • Conduct first round of candidate interviews with the Search Committee and key stakeholders • Finalize decision on the candidate of choice and negotiate employment agreement with the candidate
Day 90	• Successful Candidate accepts offer of employment

Cost

Full Executive Search:
Affion executive searches are full-service searches conducted by senior executives within our firm. The fee we have outlined herein is all inclusive of all phases of the search including stakeholder meetings, profile development, job postings, sourcing, recruitment, interviewing, reference checking, background checks and candidate offer negotiation.

Fee for City Manager search (all inclusive): $21,000

Additional expenses, which are not included in the overall fee but are expected to be reimbursed by the City of Dublin, OH include all candidate travel expenses for the purpose of interviews with the City of Dublin, OH. This will vary depending on the location of the finalist selected.

While invoice procedures can be adjusted, our typical billing practice is to spread the fee payment over three equal installments. (One-third to be billed when the contract is signed, one-third to be billed upon presentation of the Final Candidates, and the last one-third to be billed upon the hiring of the desired Candidate.) Adjustments to our payment and billing processes are negotiable in order to best accommodate our Clients' needs.

Guarantee:
As with all of our executive searches, we are prepared to offer our standard professional service guarantee. If the hired candidate is asked to leave for reasons of non-performance, or leaves of his/her own volition in the first 24 months of employment, we will re-launch a search for a new candidate, under the original position specifications. In such a case, we will do so for no additional professional fee, though charging expenses that may incur to include all Affion travel, hotel, and re-posting of job advertisements. It is our commitment to partner with you from the initial signing of the contract until the candidate accepts and offer and begins employment.

Reference List

City of Ann Arbor, MI

Steve Powers
City Administrator
301 E. Huron St.
Ann Arbor, MI 48107
734-794-6110 ext 41102
spowers@a2gov.org

Affion worked with Ann Arbor (population 113,934) on their City Administrator search in 2011, as well as, the Parks and Recreation Services Manager and Deputy Manager recruitments in 2008. Steve Powers was the successful City Administrator candidate. We are currently working with Ann Arbor on their Fire Chief recruitment.

City of Broken Arrow, OK

Russell Gale
Director of Human Resources
220 S. First Street
Broken Arrow, Oklahoma 74012
918-259-2400, ext. 5386
rgale@brokenarrowok.gov

Affion worked with the City of Broken Arrow (population 98,850) on their City Manager search in 2009 and again in 2012 as well as their Fire Chief search in 2010, their Police Chief search in 2011, their Assistant City Manager search in 2013 and their Director of Engineering / Construction. We are currently working with them on their Fire Chief recruitment. We have worked closely with Russell Gale throughout the recruitment process on all of the recruitments.

City of Kirkwood, MO

Georgia Ragland
Assistant Chief Administrative Officer
139 S. Kirkwood Road
Kirkwood, Missouri 63122
314-822-5801
RAGLANGL@kirkwoodmo.org

Affion worked with the City of Kirkwood (population 27,540) on their Chief Administrative Officer recruitment earlier this year. We worked closely with Georgia throughout the recruitment process.

Reference List Continued...

City of Round Rock, TX

Mayor Alan McGraw
City of Round Rock
221 East Main Street
Round Rock, Texas 78664
512- 246-1986
mayormcgraw@round-rock.tx.us

Affion successfully completed the City Manager search for the City of Round Rock (population 109,821) in 2010. Mayor McGraw served as a point of contact throughout the search. We had the opportunity to work with the City of Round Rock once again when we placed their Director of Human Resources in 2012 and we finished working with the City Manager on the recruitment for a new Police Chief earlier this year.

Client List

Cities:

City of Ann Arbor, MI
- Parks and Recreation Services Manager (2008)
- Parks and Recreation Services Deputy Manager (2008)
- City Administrator (2011)
- Fire Chief (2014 – present)

City of Arlington, TX
- City Auditor (2014)

City of Atlanta, GA
Chief Information Officer (2003)

City of Austin, TX
- City Manager (2008)
- Fire Chief (2008)
- Chief Information Officer (2008)
- Director of Solid Waste Services (2009)
- Chief Sustainability Officer (2010)
- Director of Code Compliance (2011)
- Chief Financial Officer (2012)
- Austin Water Utility (AWU) Assistant Director, Engineering Services (2013)
- Austin Water Utility (AWU) Assistant Director, Pipeline Operations and Maintenance (2013)
- Assistant City Manager (2013)
- Director of Procurement (2014 – present)

This city is located in Central Texas and is the capital of Texas as well as the county seat of Travis County. Austin's population has doubled every 20 years and currently sits at just over 757,500.

City of Bellevue, WA
- Director of Planning and Community Development (2010)
- Chief Communications Officer (2012)

This city of 122,900, is the fifth largest city in Washington.

City of Boulder, CO
- Director of Public Works for Utilities (2011)
- Deputy Director of Community Planning and Sustainability (2011)
- Comprehensive Planning Manager (2012)
- Human Resources Director (2013)

City of Broken Arrow, OK
- City Manager (2009)
- Fire Chief (2010)
- Police Chief (2011)
- City Manager (2012)
- Assistant City Manager (2013)
- Director of Engineering/Construction (2014)
- Fire Chief (2014 – present)

This city of 98,850 residents is the fourth largest city in the state and is the largest suburb of Tulsa.

City of Burbank, CA
- Director of Finance (2009)
- Director of Parks and Recreation (2007)

This city of 108,000 residents is located in Los Angeles County.

City of Chandler, AZ
- Chief Information Officer (2007)
- Director of Economic Development (2008)
- Director of Planning and Development (2008)

This city of 240,600 residents is located in Maricopa County and is part of the Phoenix Metro Area.

City of College Station, TX
Assistant Director of Planning & Development (2008)

This city of 86,000 residents is located in Central Texas and is the home of Texas A&M University.

City of Columbia, MO
City Manager (2011)

This city of 108,500 is the fifth-largest city in Missouri. Columbia is often referred to as "Collegetown U.S.A." because it is home to the University of Missouri, Stephens College and Columbia College.

City of Corpus Christi, TX
City Manager (2008)

This city of 285,000 residents is located in South Texas along the Gulf Coast.

City and County of Denver, CO
Manager of Community Planning and Development (2012)

City of Dallas, TX
- Deputy Director CIS (2005)
- Public Information Officer (2005)
- Assistant Director Dallas Water Utilities (2005)
- Assistant Director CIS (2005)
- Director and Chief Information Officer (2005)
- Director of Housing (2014)
- Assistant City Manager (2014)

City of East Lansing, MI
City Manager (2012)

City of El Paso, TX
City Manager (2014)

City of Eugene, OR
Executive Director of Planning and Development (2010)

This city of 156,185 is the second largest city in the state of Oregon and the seat of Lane County.

City of Galveston, TX
City Manager (2011)

City of Hollywood, FL
City Manager (2011)

City of Huntsville, TX
City Manager (2008)

City of Irving, TX
- City Manager (2006)
- Assistant City Manager (2008)
- Internal Auditor (2008)
- Director of Human Resources (2007)
- Assistant Director of Human Resources (2007)
- City Attorney (2007)
- Fire Chief (2006)
- City Secretary (2010)

This city of 202,000 residents is located centrally in Texas and is a central city in the Dallas- Ft. Worth Metroplex. It is also home to the DFW International Airport.

City of Kirkwood, MO
Chief Administrative Officer (2014)

City of Leander, TX
City Manager (2011)

City of Los Angeles, CA
- CIO-Los Angeles World Airport (2007)
- General Manager, ITA (2002)
- Information Systems Manager (2002)
- General Manager Department of Aging (2003)
- Director, Bureau of Sanitation (2004)
- Los Angeles Zoo: General Manager (2003)
- City Engineer (2003)

City of Lynwood, CA
- Assistant City Manager (2007)
- Director of Human Resources (2007)
- Assistant Director of Public Works (2007)
- Deputy Director of Development (2007)

This city of 70,000 residents is located in Los Angeles County.

City of Marshall, TX
- City Manager (2014 – present)

City of McKinney, TX
- City Manager (2008)
- Assistant City Manager (2009)
- Director of Finance (2011)
- Director of Water Utilities and Infrastructure (2013)

This city of 121,000 residents is located in the Dallas-Ft. Worth Metroplex and is one of the fastest growing cities in the country.

City of Mesa, AZ
- Deputy City Manager (2007)
- Director of Human Resources (2007)

City of Morgantown, WV
City Manager (2010)

This city of 70,000 is the largest city in North-Central West Virginia, and the base of the Morgantown metropolitan area.

City of North Richland Hills, TX
City Manager (2009)
General Manager: NRH2O, Water Park (2014)
This city of roughly 60,000 residents is also located in the Dallas-Ft. Worth Metroplex.

City of Plano, TX
- City Manager (2010)
- City Attorney (2013)

The city of 222,030 is the ninth-largest city in Texas and is located mostly in Collin County.

City of Round Rock, TX
- City Manager (2010)
- Director of Human Resources (2012)
- Police Chief (2013)

This city of 105,412 is part of the Austin–Round Rock–San Marcos metropolitan area.

City of San Antonio, TX
- City Manager (2006)
- Assistant City Manager (2006)

This city of 1.6 million residents is the 7th largest city in the United States.

City of San José, CA
- Deputy Director of Administration (2006)
- Deputy Director of Integrated Waste Management (2006)

This city of roughly 1 million residents is located at the southern end of the San Francisco Bay Area.

City of San Marcos, TX
- City Manager (2008)
- Human Resources Director (2011)
- Chief Building Official (2011)

This city of 50,000 residents is located in Central Texas between San Antonio and Austin.

City of Savannah, GA
City Manager (2010)
This city of just over 130,000 is the largest city and county seat of Chatham County, in the U.S. state of Georgia.

City of Scottsdale, AZ
Police Technology Director (2009)
This city of 217,385 is located in the eastern part of Maricopa County, Arizona, adjacent to Phoenix.

City of Springfield, MO
City Manager (2008)
This city of 156,000 residents is the 3rd largest city in Missouri.

City of Tacoma, WA
- Assistant City Manager (2006)
- Director of Finance (2007)
- Director of Information Technology (2008)
- Assistant Director of Finance (2009)

This city of just under 200,000 residents is the 3rd largest city in Washington.

City of Tamarac, FL
- Fire Chief (2009)
- Director of Community Development (2013)

This community of 60,000 residents is located in Broward County located in Southern Florida.

Incorporated Village of Garden City, NY
Village Administrator (2014)

Counties:

County of Los Angeles, CA
- Information Systems Manager (2007)
- CIO-Los Angeles World Airport (2007)

This county is the largest county in the US with a population of 9.8 million and 88 incorporated cities.

City and County of Philadelphia, PA
- Chief Information Officer (2000)
- CIO-Philadelphia Free Library (2001)
- CIO- Philadelphia Police Department (2006)

Philadelphia is known as both the city and the county with a population of 1.4 million.

Milwaukee County, WI
Director of Parks, Recreation & Culture (2013)

Washtenaw County, MI
Community Development Director (2007)

This is a county located southwest of Detroit and its largest city is Ann Arbor. The population of this county is over 322,000 residents.

States:

Commonwealth of Pennsylvania-Office of Administration
- Chief Information Officer (2008)
- Chief Technology Officer (2008)
- Deputy Chief Information Officer (2008)

Commonwealth of Pennsylvania-Department of Health
- Deputy Secretary of Quality Assurance (2008)
- Deputy Secretary of Health Promotion (2008)
- Bureau Chief of Drug and Alcohol (2008)

The Commonwealth engaged our services in November of 2007 to identify the next CIO. Out of that search process, the Commonwealth hired three individuals. In March of 2008, our services were once again retained to assist with the Department of Health.

State of Texas, Austin, TX
- Director of Benefits - Employee Retirement System of Texas (2006)
- CTO - Employee Retirement System of Texas (2005)
- Chief Information Officer of DIR (2006)

Education:

Harrisburg University, Harrisburg, PA
- Director of Learning Assessment (2009)
- E-Business Program Director / Faculty (2008)
- Learning Technologies Program Director / Faculty (2008)
- CIS Program Director / Faculty (2007)
- Biotechnology Professor (2008)
- VP for Development (2005)
- Director of Development (2007)
- Controller (2006)
- Network Administrator (2006)

Other:

The Round Rock Chamber of Commerce, TX
President/Chief Executive Officer (2014)

Housing Authority of the City of El Paso, TX
Chief Operating Officer (2010)

Minneapolis Parks and Recreation Board, MN
- Assistant Superintendent of Planning (2011)
- Assistant Superintendent of Recreation (2012)
- Deputy Superintendent (2012)
- Assistant Superintendent of Environmental Stewardship (2012)
- Director of Park Safety and Security (2013)
- Human Resources Manager (2013)

Roanoke Redevelopment and Housing Authority
Executive Director (2006)

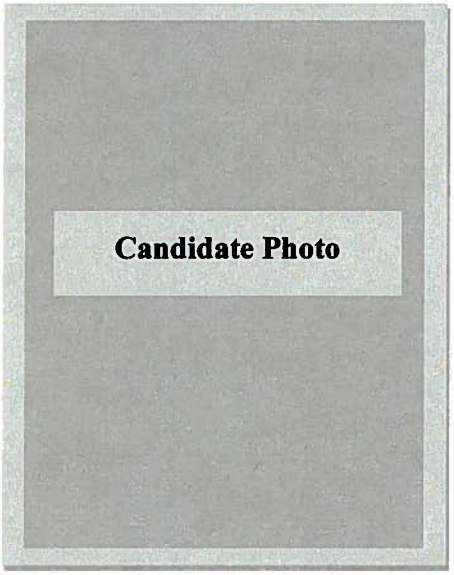
Williamson-Burnet County Opportunities, Inc. (WBCO)
Executive Director (2013)

affion PUBLIC

Thank you for the opportunity to submit this proposal.
We look forward to assisting you with your
Executive search needs!

Sample Search Report

Candidate's Name



I was born and raised in Texas and grew up a son of a City Manager. Having lived in *(deleted)*, *(deleted)*, *(deleted)* and *(deleted)*, I had no idea what a City Manager did, other than move every few years. After graduating from *(deleted)* State University with a degree in Criminal Justice, I soon realized that this was not the career path for me. I quickly began talking to local City Managers about a career in city management, including my father, who gave me advice that if I wanted to do this as a career I must have the following attributes: sense of humor, thick skin and don't take myself too seriously.

When I began my Master's degree at the University of *(deleted)*, I gained an internship in the City Manager's office in *(deleted)*, *(deleted)*. Over the next five plus years, I took on many different responsibilities, with the most notable being to develop the city's first office of Economic Development. My whole focus in developing the office of Economic Development was for it to be a grassroots approach with the Mayor and City Manager being the key personnel to make deals happen. The main reason for this was to have the chief policy maker and chief administrative officer involved in all key deal making meetings.

After more than five years, I decided it was time for me to attempt to be a City Manager. In February 1992, I was hired as City Manager of *(deleted)*, at the age of 27. I was the fifth manager in five *(deleted)* and*(deleted)* was soon becoming and destined to become a high growth city. Soon after arriving in *(deleted)* I married my wife, *(deleted)*; and the community treated us with so much care, respect and affection. In fact, due to our roots and love for that community, after only serving as Manager for 3 ½ years, I was invited back last year to help recognize the 100-year anniversary of the Fire Department.

In 1995, I decided I wanted more challenges and was hired as City Manager of *(deleted)* a city of 25,000 people south of *(deleted)* The city was a racially diverse community of a third of Hispanic, African-American and Anglo, not to mention a city consisting of single-member districts. The City of *(deleted)* experienced many challenges related to financial losses, a tornado and key industrial development. During this time, I was able to solidify the city's financial picture, create a strong team of department heads and work with the Department of Transportation on key projects as the city had two interstates dissecting the community. After three years, I realized the community and council vision was not in line with my future prospects, so I left to become Development Director for the City of *(deleted)*.

Within months, I was named as Assistant City Manager of *(deleted)* and was charged with revamping the entire development procedure. My key functions were over the development process, economic development and creating a system to streamline the city's process, making it more user friendly. During my tenure in *(deleted)*, I worked on two major projects – a redevelopment project of a major mall and a new $600 million neo-traditional new urbanism project. Over the more than five years, I was heavily involved in the development review process, new commercial developments, transportation projects and a voter approval bond program.

In 2003, I left the State of *(deleted)* to take the position of City Manager of *(deleted)*, a mountain resort/tourism community of 45,000 people. It was a little unsettling and nerve racking to leave the State of *(deleted)*, but I felt I needed to better round out my career, not to mention explore a different set of challenges. In *(deleted)*, the two main challenges were long term water supply and annexation – two issues I had little experience in *(deleted)* Over the next seven years, we paid cash for a downtown parking garage, library expansion, fleet maintenance facility, communication center and a senior citizen center. The city went through unprecedented high growth, increased revenue and major service enhancements.

The last three years have been extremely challenging due to the economy and all revenue sources have been affected. My current situation is good, I enjoy a unanimous City Council and my children are happy in *(deleted)*.

SAMPLE

Why I Should be the City Manager for the City of *(deleted)*

In my 25-year career of public service, I have always prided myself in serving the communities that employ me with pride, hard work and a tenure that meets the ethical standards of ICMA.

I became a City Manager at 27 years of age, served as a City Manager in a racially diverse and politically charged community, and then as City Manager in a different state that was a tourism-based and extremely wealthy community.

All of these communities had a unique set of advantages and strengths. When I left *(deleted)*, in 1995, it had a population of 12,000 people; today 45,000 people call *(deleted)* home. *(deleted)* is consistently ranked in the top 10 best communities to retire, best community for outdoor recreation and best community for culture. The thought of leaving *(deleted)* is not a decision I take lightly.

That being said, however, to be the City Manager of *(deleted)* is the dream job of a professional career. *(deleted)* has achieved many accolades itself. They include best managed, safest and high growth. As a *(deleted)*, I know the positive reputation *(deleted)* enjoys throughout the State.

The City is well funded and well positioned to take *(deleted)* to an even higher level. It has been this council and past council's vision while following a strategic planning process that insures *(deleted)* will continue to be the leader of the region. A strategic planning process is essential to ensure staff and elected officials are in lockstep with the vision of the organization and community. Furthermore, it is a process that needs to be shared with the stakeholders - the citizens. They need to know we are taking a businesslike approach to the operations and business affairs of the city.

I have spent my career in different types of cities and it's that type of perspective that gives me a well-rounded approach to the job. Is *(deleted)* a bigger city than *(deleted)*? Yes. Does *(deleted)* have a larger budget than *(deleted)*? Yes. Yet, it's not about the numbers, but about the people and how you work with people, motivate people, listen to people and encourage people to achieve great things.

These are areas that I have excelled in during my public career. I have been fortunate to hire great people and instill loyalty and trust in not only these professionals, but councils as well. I have achieved this by helping those around me embrace the goals of the organization as outlined by the desires of the community.

I don't hide behind a computer, nor hide behind e-mails. While today's city manager must be creative, innovative and willing to meet the citizen on any level, I prefer an open and accessible style of management.

My career has been multi-faceted and it's this type of diversity that I would bring to *(deleted)*. Does the city of *(deleted)* need a major reorganization? Not likely; however, I think the city needs someone to be aggressive on the development review process and bring a strong personal touch to the organization and its citizens. My career has seen much success as it relates to organizational development, citizen intervention and bringing a personal touch to organizations that may need change.

I am not looking to leave*(deleted)*, as I have enjoyed seven great years here. Yet, there are only a small handful of jobs in *(deleted)* that I would consider leaving *(deleted)* to pursue. *(deleted)* is at the top of the list. *(deleted)* has so many quality of life advantages and opportunities my family would enjoy. In every decision we make, it must be a win-win for all of my family. We believe *(deleted)* is one of those rare opportunities for a win-win.

New Development, Retention Programs and Redevelopment Experience

It is the City Manager's role to set the tone of development for the organization. Without question, the City Council approves each development, and with that approval creates the future of a community. The city staff brings to City Council code changes and those code changes should be carefully articulated for the pros and cons of what is being considered.

It doesn't matter whether it's high growth or no growth - the premise remains the same. What is the vision of City Council and what type of development is desired? Yes, city staff makes recommendations, hopefully with a full set of information that allows City Council to make the most informed decision. Once the information is delivered, council has the pros and cons, and staff has communicated the vision - we must be in unison as how we move forward with the new development.

Yet, first and foremost, the most impartial thing the city can do is improve the development process. People can say the city needs to do this and that, but without question cities needs to streamline the development process. It is too commonplace for the city to hide behind rules and regulations; oftentimes with little or no thought given to the unintended consequences of these actions. So, for a city to be truly effective, we must preserve the city's core development ideals, while taking a realistic approach to the overall development of the site.

Another area sometimes neglected is in focusing on those businesses that are already in a community. Many communities view new development as far more glamorous than retention efforts at the local level. The lifeblood of any community is what the existing businesses can, or are willing, to do locally. In *(deleted)*, the Mayor and I have taken it upon ourselves to be the lead economic developmental professionals, with the main policymaker and the main administrative decision maker acting in unison as it relates to economic development. On a monthly basis, the Mayor and I meet with one local business to insure they are content and willing to continue doing business in *(deleted)*. It is not only my role, but the City Council's role, to insure businesses continue to see the city as a successful environment for their business.

In three cities which I have served, redevelopment has always played a key role in a neighborhood's success. A specific redevelopment project must be carefully evaluated to insure that the correct vision is being achieved for citizens. There are questions, tough questions, that need to be answered, for example, "Is this the right development project? What are the impediments to success? What is the city's specific role in the project?"

The entire development process must have "buy-in" from City Council, and a clear and articulated vision from them. The city's primary role is to have a development process that makes sense and can pass the test of being reasonable. It is with this philosophy that *(deleted)* can continue being a player, and more importantly, rise to an even higher level.

Without question, we will succeed together or fail together. The City of *(deleted)* has a clear vision as to the future, and they need a manager to continue steering that vision. Staff must navigate the waters to bring Council the standards it desires for decision making, keeping in mind, it is staff's role to make the process reasonable, fair, clear and indicative of the pro-business climate desirable in *(deleted)*.

Financial Leadership Experience

I think it goes without saying that most managers would describe themselves as a fiscal conservative. However, I think several indicators can be used to illustrate whether or not one is a fiscal conservative. First of all, reviewing the city's bond rating and fund balance reserves is a quick indicator. While it's true that Mayors and City Councils approve budgets, it's up to the Manager to make recommendations on financial policies and ultimately the city budget.

The City of *(deleted)* enjoys an AA bond rating, not to mention maintaining a 20 percent fund balance in the general fund. With the economy suffering the last three years, *(deleted)* has maintained this bond rating, and even more incredible, has maintained the 20 percent reserve fund balance. Furthermore, our policy has been to place all excess general fund revenues in a capital improvement fund, in order to pay for one-time capital projects---a pay as you go approach. The City of *(deleted)* does issue debt, but this capital improvement fund has enabled the city to pay cash for many brick and mortar projects.

As for the city's budgetary process, I have always considered the city's annual goal setting retreat as that first step in the budget process. The goals setting retreat is always held the month prior to city staff starting the long arduous budget process. The primary point of this is to ensure that all department heads understand the council's direction, thoughts, and priorities. It is after this two day retreat (executive staff is there for one day) that department heads build their budgets based on council direction. The budget retreat looks at a five year window, but targeted issues are identified for the following year. It is always imperative that any new service enhancements and new programs must have a financial/business plan associated with it to ensure that it is feasible, along with communicating it to the public. It is imperative that an open, honest and transparent approach to city finances is delivered to the public. In our current economic climate, with a strong anti-government sentiment, we must be consistent, accurate, and open with all of our communication with city finances.

In addition, cities need to be creative in how they approach their entire capital improvement program. It has been my past practice that all projects coming in under budget have those dollars set aside and restricted. Toward the end of the year these leftover funds are used to fund worthwhile and needed projects that were unable to be budgeted. This fades away the "financial creep" and the lackadaisical "carry over" to the next year. This approach gives each department head incentive to carefully manage and examine projects and expenditures. Every quarter, Council will receive an update on the status of projects currently under construction and those projects that are upcoming. This status report gives Council a report card on what has been achieved, and the realization that many projects do come in under budget. Yet, citizens can focus on those few projects that have change orders, which in reality most projects should come in under budget---due to unit price contracting.

As City Manager, I set the 35,000 foot level for city finances as I hold my Finance Director accountable for monthly tracking of departmental expenses and revenue tracking. This high level overview should be communicated to council and all city employees. Without question, the policy makers need to understand our financial standing, but I also think our employees need to understand our financial picture or at least given the information. Employees today are much more savvy, intelligent, and curious than many people realize. As the *(deleted)* City Manager, finances are not the only thing, but the Mayor and City Council need to know the issues, and avoid surprises.

Relationships within the Community, City Government, Boards and Commissions

This question and the following one on management styles are probably my two strongest areas in what I would bring to *(deleted)*. Throughout my whole career, I have told many executive staff, "I don't care how strong you are technically, but if you can't deal with people and build relationships you will not succeed in this business."

My expectation when I hire a department head is they are all competent and can technically do the job. The difference is who can handle the personal side, build lasting relationships and get the most out of people. In the business of public service, building relationships is paramount to an organization's success. These relationships need to not only be based on honest, open communication, but also on knowing when and where to pick your battles. An effective manager must know when to "fall on your sword" or when to fight another day. I have found a confrontational posture is rarely successful, while a thoughtful, honest discussion is more likely to yield results.

As City Manager I am expected to be very active in community groups, not to mention available to speak to both civic groups and homeowners' associations. Many times the environment can be challenging, but it's critically important to maintain a professional demeanor, thick skin and accurate, non-defensive posture. I have found in my career that most people just want to be heard and told the truth - they may not agree with you, but typically leave somewhat pleased, if communicated with in an honest and respectful manner.

The City Manager is often viewed as the chief negotiator for the city, as it relates to economic development projects, development issues, and routine citizen complaints. As Manager, I have always had an informal, relaxed, non-confrontational style as I approach situations. I have always enjoyed success with this type of approach, and I have used this same style with citizens as well as staff. My staff has always realized I am just one on the team and it takes all of us working together to achieve success. There is always a time and a place to forge ahead and be aggressive, but those instances must be weighed very carefully, and employed judiciously.

While dealing with employees, this is probably one area of city management that I really enjoy and oftentimes is the most meaningful. Once a month I have coffee with seven or eight non-management employees from various departments to have an open dialogue on anything and everything. Its breaks down the stigma of the city manager's office being ogres, and employees realize I enjoy family time, sports, vacations, and the national economy just like they do. I feel it's very important that I connect with these employees and give them uninterrupted access to me as a professional and as a person.

Along these same lines, I personally meet with all employees, anywhere from 20 to 30 meetings, scheduled at 7 a.m., 12 noon, 6 p.m. or 11 p.m. to outline the city's goals, objectives and budgetary issues for the coming year. I call these my State of the City addresses. I give them the opportunity to ask me any question they desire. I have always prided myself on the positive relationships I have developed and maintained with city employees. After all, local government is all about providing service and our people are our number one priority.

Overall, I have a very positive rapport with all work groups city wide, including Public Safety. With more than seven years as City Manager, I encourage anyone wanting to know about my management style to speak with the Fire Union President, Police Officers, Sanitation workers or any department head in *(deleted)*. You will quickly realize the morale and relationships I have worked to develop is extremely trusting, strong, and likeable. This is a part of the position I thoroughly enjoy and would bring to *(deleted)*, not by design, but rather through a natural way of doing business, and an extension of my personality.

Management Style and Philosophy

This is probably my strongest attribute as a city manager and a primary reason for my longevity in *(deleted)*. The mode of operation throughout my career has been to surround myself with talented people, give them room to succeed, provide direction and expect them to make decisions and stand by them, while holding them accountable.

I enjoy coming to work each day, and having fun, while getting the job done. I am not a manager that becomes consumed in the process, rather I am a manager consumed with the outcome. There is always something to be said for the "process", but many times the end result and outcome is often overlooked for the "process". I have seen too many organizations become frozen and unwilling to make decisions or compelled to make decisions by committee. I have very competent department heads, and I fully expect them to carefully review the issue, analyze their options and make a decision; then move on to the next topic.

I am an even keeled City Manager who rarely loses his cool. Do I get animated at times? Yes. Do I get frustrated? Yes. But, I don't lose my temper, because this type of attitude discourages innovation and risk taking. If department heads see the City Manager angry or out of control, they will be less likely to push the envelope innovatively, and will begin to make decisions as to what needs to be done based on their own self preservation, not on what is best for the community. It is this type of management philosophy I trickle down through the organization, and regularly communicate this to top level and mid-level managers. I routinely conduct executive level retreats with a strong emphasis on team work, understanding the City Council priorities and using a few quirky exercises to build camaraderie, trust and fun within the executive staff.

As City Manager, I know the community expects me to be a player, speaker, supporter and contributor of each civic group, news media, homeowner's association, etc. That is a role I enjoy. I conduct that role with a very casual, open and direct response. I realize many citizens do not understand how government operates, how to navigate its departments, acronyms, state law impediments, etc. So, it is our responsibility as a city's ambassadors to have a disarming style which tears down those discomforts and fears.

I routinely have up and coming city manager interns throughout the state approach me, interview me and want to work for the City of *(deleted)*. I feel it is my obligation to mentor these young people, especially in a career that needs young talent. I am frequently called on by our legislative delegation to assist them in a variety of ways. Again, this comes with the position, and I think it is important that I make myself available to all these opportunities to share and impact my field of work. Regardless of the different roles I play, the Mayor and City Council will always know what I am doing. We must be in lockstep on how we move the organization forward in every way.

I have a verbal style of management and am very social. I do not subscribe to the notion that we hide behind technology, i.e. e-mails, texts and blackberrys. We are in public service and that entails dealing face to face with employees, citizens and businesses. I truly believe more things are accomplished and more issues resolved by sitting down "eyeball to eyeball" with all those involved in the situation, not relying on e-mails to do the job.

There is not one department head in *(deleted)* that doesn't know my management style and understand the TEAM concept. When one fails, we all fail. When one succeeds, we all succeed. Until this vision resonates, there will still be an us versus them mentality, and an individualistic style of management. That is not my management style, and I feel, it is not a productive style, while an inclusive team-oriented style is much more productive for all of the community.

I would thoroughly enjoy being the next City Manager of *(deleted)*, and bringing this style of management to the city. It is imperative that a "right fit" exists between the new manager and City Council. Any of the finalists can handle the job technically, but the manager, spouse and kids have to be the "right fit" with the community, organization, Mayor and City Council in order for the highest level of success to be achieved for all.

SAMPLE

Affion Public, LLC
20 North Second Street, Suite 200
Harrisburg, Pennsylvania 17101

888.321.4922 *tollfree*
717.214.2205 *fax*

www.affion*public*.com

Candidate

Candidate Name

Synopsis

- Nearly 25 years successful management experience with a combined 14 years as a City Manager in *(deleted)*
- First-hand experience managing growth-oriented cities, diverse populations and citizen-involved communities
- Interspersed with city manager stints, served as Assistant City Manager in a high-growth community of 60,000

Experience

City Manager
City of *(deleted)*
2003-Present
Population – 45,000

- Assisted in development and construction of city facilities, totaling more than $40 million – all with a "pay-as-you-go" approach, including a downtown parking garage discussed by council for more than 30 years
- Developed pre-annexation agreements for more than 15,000 acres – all for commercial, retail and residential development
- Successful passage of a hotel tax designated for increased support of the arts
- Finalized a successful revitalization project in an under-utilized area, bringing jobs, sales tax creation and services
- Completed more than $200 million of capital improvements for infrastructure city-wide
- Developed a succession plan for mid-managers titled "Rising Stars", due to pending and upcoming retirements
- Rebuilt police department from "old guard" to progressive/modern department by utilizing technology, community involvement and open communication
- Planning a $175 million water importation project to serve as a 50-year water source
- Implemented an aggressive neighborhood revitalization program, utilizing streets, grants, code enforcement and, in some cases, public safety
- Assisted in making *(deleted)* airport the 4th busiest in the state, with over 225,000 operations annually, by way of grants and attracting two commercial carriers
- Developed and maintained aggressive financial reserve program, which has enabled city to pay cash for many capital improvement projects

SAMPLE

Assistant City Manager
City of *(deleted)*
1998-2003
Population – 60,000

- Direct management responsibilities for all Development Services, including: streets/drainage, water/wastewater, engineering/CIP, planning/inspections, environmental and economic development
- Coordinated highway improvements worth $75 million with *(deleted)* Department of Transportation, expediting bid letting, and exploring upgrades to landscaping and aesthetics
- Successfully reorganized Planning/Inspections with Economic Development Department, reducing development review time by Public Works and Planning/Inspection staff
- Successfully negotiated developer agreement gaining council approval of $100 million renovation of *(deleted)* . City partnership is 100 percent performance-based, utilizing a combination of revenue sources
- Successfully negotiated and gained council approval on developer agreement for a $650 million town center development
- Assisted in developing and gaining council approval on a Tax Increment Finance District for a recreation center and library
- Developed new standards for landscaping and sign regulations for commercial businesses
- Assisted with rewriting zoning ordinances dealing with "big box" retailers, architectural standards and residential adjacency issues
- Implemented a Development Review Committee (DRC), which met weekly with representatives from all city departments, developers, owners and builders awaiting council approval

City Manager
City of *(deleted)*
1995-1998
Population – 25,000

- Improved city's financial standing by organizational restructuring and privatization. Reorganization saved $500,000 annually
- Initiated development of $6 million library and $8 million recreation center
- Implemented a computer-aided dispatch system for police and fire-one of only two other cities in State of *(deleted)* with this level of technology
- Implemented a bond program for water and wastewater that received 3-to-1-voter approval in 1998
- Successfully privatized several city operations, reducing costs and improving service
- Drastically streamlined city's planning and development process, while toughening city's standards and enforcement of all building codes
- Successfully assisted in upgrading city's bond rating-marking the first upgrade in ten years
- Initiated a new board and commission appointment process, along with an introductory training session

SAMPLE

City Manager
City of *(deleted)*
1992-1995
Population – 15,000

- Upgraded financial management of city, including major increases in fund balance and working capital
- Successfully responded to the *(deleted)* Tornado, which resulted in damages exceeding $20 million
- Implemented a successful 1995 bond election for improvements to water, sewer and streets
- Upgraded city's bonds rating with Moody's and Standard & Poor's

- Assisted with the passage of a one-half cent sales tax for parks, recreation and library improvement programs
- Improved communication to city council – status reports, voicemail and agenda packets
- Improved employee morale through numerous programs – employee newsletter, quarterly social events and quarterly employee updates

Assistant to City Manager/Director of Economic Development
City of *(deleted)*
1986-1992
Population – 40,000

- Served as Assistant to City Manager, providing support to City Manager in all aspects of public management.
- Directed and managed city's economic development program.
- Coordinated city's Strategic Planning process, with 100 participants.
- Initiated and implemented a grass roots approach to economic development that re several awards.

Education

MA - Urban Affairs
(deleted), 1988

BS - Criminal Justice
(deleted), 1985

Professional Affiliations & Activities

- International City/County Management Association
- National League of Cities

Articles & Awards

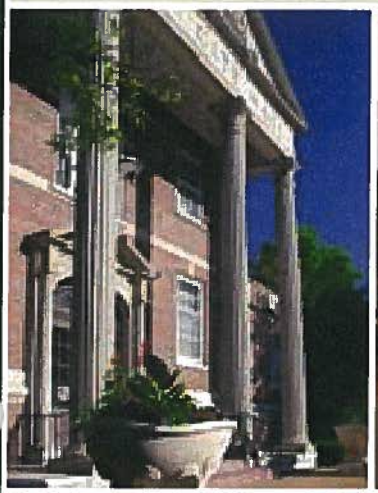
- Board Member –*(deleted)* Rotary Club
- Board Member – *(deleted)* YMCA
- Campaign Chair of United Way of *(deleted)* County
- Executive Committee Member for *(deleted)* Distinguished Alumni Board
- Served as At-Large Board Member - *(deleted)* City Management Association
  Member of *(deleted)* Rotary Clubs
  Speaker at several conferences and events – including *(deleted)*
- Member of *(deleted)* Public Policy Committee *(deleted)*

SAMPLE

Sample Position Profile/Brochure

City of Kirkwood, MO

Chief Administrative Officer



Where Community and Spirit Meet

139 S. Kirkwood Road
Kirkwood, Missouri 63122

The Community

Kirkwood, Missouri, was established in 1853 and today is a 9-square-mile community with a population of 27,540. Located in Southwest St. Louis County, Kirkwood boasts high property values, quality public and private schools, safe neighborhoods and exceptional City services. More than 300 acres of park land can be found throughout the community, from a large central park that includes an aquatic center, ice rink, outdoor amphitheater, ball fields, tennis courts, picnic sites, and playground areas, to smaller neighborhood parks.

It's called "Queen of the St. Louis Suburbs," an honor Kirkwood has proudly accepted since the late 1800s. As the first planned suburb west of the Mississippi River, and an early railroad commuter suburb, Kirkwood owes its very existence to the railroad. The City was even named after James Pugh Kirkwood, the engineer in charge of locating, surveying and building the railroad. From the beginning, it's been a love affair between citizens and trains, as evidenced by the historic city-owned train station located in the heart of the City. Built in 1893, the station, which is on the National Register of Historic Places, is a favorite subject of local and national photographers. It currently serves as a stop for daily Amtrak passenger trains and is staffed entirely by Kirkwood residents who volunteer their time.

The downtown business district is on the National Register of Historic Places and is home to many restaurants and shops as well as the Kirkwood Farmers' Market.

The City of Kirkwood presently employs about 250 people who work in a variety of departments. The annual operating budget of Kirkwood is approximately $60 million. The City operates under a council/manager form of government with the mayor and six council members elected at large. The City is a full-service municipality, with its own water, electric and sanitation departments, making it unique among St. Louis County municipalities.

Government

The City of Kirkwood's Charter places administrative authority with the Chief Administrative Officer and legislative and policy-making authority with the City Council. The Mayor and six Council members are elected at large, meaning they serve all residents of Kirkwood equally. The Mayor and council members are each elected for a four year term with term limits set after two consecutive terms.

Mission

Mission Statement: The mission of the City of Kirkwood is to enhance the quality of life for current and future generations of Kirkwood residents through strong leadership, effective stewardship, and exceptional service.

Vision

Vision Statement: Kirkwood will be one of the most livable communities in the United States; a place recognized for its beauty, historic charm, strong neighborhoods, vibrant businesses and involved citizenry.

The Administration Department

The Administration Department consists of the Chief Administrative Officer, Assistant Chief Administrative Officer, Public Information Officer, and an Administrative Secretary. The Administration Department links the vision set out by the elected officials with the departments responsible for implementing that vision within the parameters of the city's code of ordinances and adopted budget.

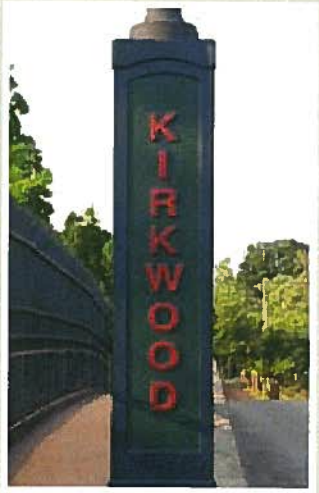
The Administration Department helps "facilitate the prompt, economical and efficient dispatch of city business" (Charter of the City of Kirkwood, Missouri, 1983). It also serves as an important interface between the council, the public, and city departments. Members of the department bring to the city professional city management and public relations skills and play an important leadership role in the governance of the community.

The Chief Administrator

The City of Kirkwood in its charter chose to place legislative and policy-making authority with the City Council and administrative authority with the Chief Administrative Officer.

Major Duties, Knowledge and Skills

The Chief Administrative Officer is directly responsible to the City Council for all operations of the city as well as implementation of policies and programs adopted by the Council. The Chief Administrative Officer appoints, directs and supervises all officers and employees of the City except for the City Attorney, the City Clerk, the Municipal Judge and the Provisional Municipal Judge. Appointment of subordinates is generally delegated to the appropriate Department Director.



The Chief Administrative Officer shall:

- Attend all meetings of the council and committees of its members.
- Supervise and be responsible for the preparation of the annual budget and capital program and submit both to the council.
- Submit to the council and make available to the public the complete report on the finances and administrative activities of the city as of the end of each fiscal year.
- Keep the council fully informed so that the council shall properly execute their legislative and policy making functions and make such other reports as the council may require concerning the operations of city departments, offices and agencies subject to the direction and supervision of the Chief Administrative Officer.
- Prepare and submit to the council a statement of policy recommendations for programs and priorities which, in the opinion of the Chief Administrative Officer, should be considered by the council.
- Keep the council fully advised on the financial condition and future needs of the city and make such other recommendations to the council concerning the affairs of the city as is deemed advisable.

Ideal Candidate

This is a key position within the City government environment and it is essential for the successful candidate to work closely with the City Council in carrying out city-wide initiatives and setting the tone and vision for the employees of the city. The ideal candidate will be fiscally conservative and have a strong background in finance; knowledge of and familiarity with the budgetary process and enterprise funds will be imperative. Prior experience with redevelopment projects and electric utilities will be beneficial.

This individual will be an outgoing, visible leader with a genuine interest in actively participating in the community. The ideal candidate must exhibit strong coordination and relationship-building skills in working with the entire organization and set a positive example of competence, professionalism, energy and work ethic to the organization and community.

The ideal candidate will be a professional leader who inspires the staff to achieve excellence. This individual should have experience in strategic planning and organizational development. Effective communication along with strong collaboration and team building skills will be necessary for this individual to be successful; advanced written and oral communication skills are imperative. The ideal candidate must have the capacity and interest to be an effective mentor and leader for staff.

This individual must be able to adhere to the highest ethical and moral standards and be able to display transparency.

Education

Interested candidates should possess a Bachelor's degree in Public Administration, Business Administration or closely related field. A Master's degree in Public Administration, Business Administration or closely related field is preferred.

Salary

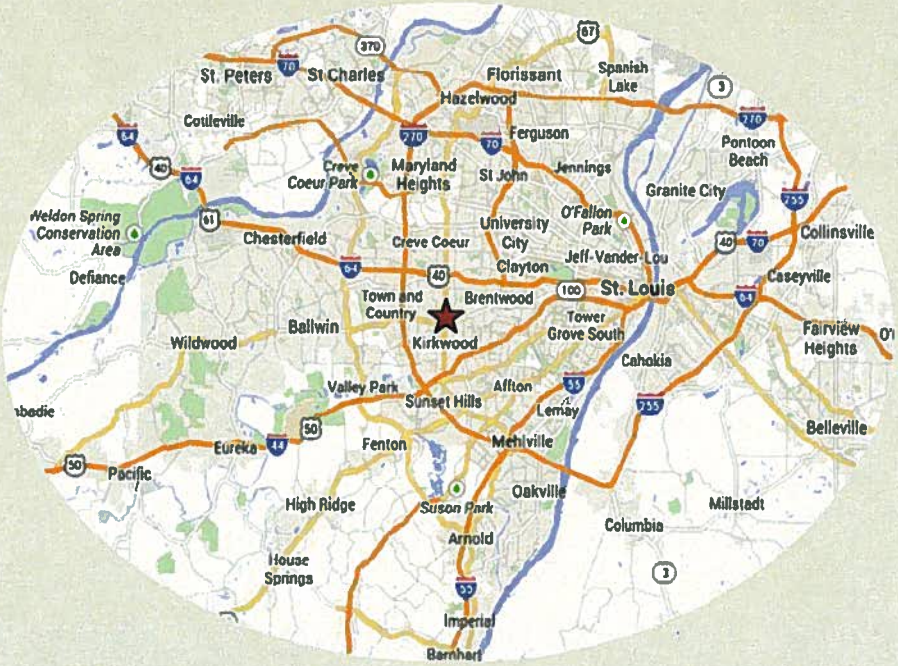
The City of Kirkwood is offering a competitive salary commensurate with experience and a comprehensive benefits package. Residency within the City of Kirkwood is required, and the reimbursement of relocation expenses will be included as part of the compensation package.

How to Apply

Interested applicants should forward a cover letter and resume to:

resumes@affionpublic.com
Reference: KIRKWOOD

Affion Public
20 North 2nd Street, Suite 200
Harrisburg, PA 17101
888.321.4922
Fax: 717-214-2205
www.affionpublic.com

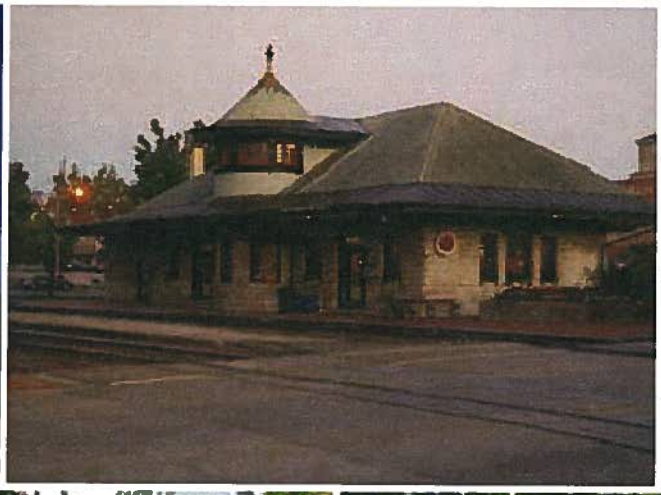


affion PUBLIC

Delivering Leaders.

City of Kirkwood, MO

Chief Administrative Officer



Where Community and Spirit Meet

139 S. Kirkwood Road
Kirkwood, Missouri 63122

The Community

Kirkwood, Missouri, was established in 1853 and today is a 9-square-mile community with a population of 27,540. Located in Southwest St. Louis County, Kirkwood boasts high property values, quality public and private schools, safe neighborhoods and exceptional City services. More than 300 acres of park land can be found throughout the community, from a large central park that includes an aquatic center, ice rink, outdoor amphitheater, ball fields, tennis courts, picnic sites, and playground areas, to smaller neighborhood parks.

It's called "Queen of the St. Louis Suburbs," an honor Kirkwood has proudly accepted since the late 1800s. As the first planned suburb west of the Mississippi River, and an early railroad commuter suburb, Kirkwood owes its very existence to the railroad. The City was even named after James Pugh Kirkwood, the engineer in charge of locating, surveying and building the railroad. From the beginning, it's been a love affair between citizens and trains, as evidenced by the historic city-owned train station located in the heart of the City. Built in 1893, the station, which is on the National Register of Historic Places, is a favorite subject of local and national photographers. It currently serves as a stop for daily Amtrak passenger trains and is staffed entirely by Kirkwood residents who volunteer their time.

The downtown business district is on the National Register of Historic Places and is home to many restaurants and shops as well as the Kirkwood Farmers' Market.

The City of Kirkwood presently employs about 250 people who work in a variety of departments. The annual operating budget of Kirkwood is approximately $60 million. The City operates under a council/manager form of government with the mayor and six council members elected at large. The City is a full-service municipality, with its own water, electric and sanitation departments, making it unique among St. Louis County municipalities.

Government

The City of Kirkwood's Charter places administrative authority with the Chief Administrative Officer and legislative and policy-making authority with the City Council. The Mayor and six Council members are elected at large, meaning they serve all residents of Kirkwood equally. The Mayor and council members are each elected for a four year term with term limits set after two consecutive terms.

Mission

Mission Statement: The mission of the City of Kirkwood is to enhance the quality of life for current and future generations of Kirkwood residents through strong leadership, effective stewardship, and exceptional service.

Vision

Vision Statement: Kirkwood will be one of the most livable communities in the United States; a place recognized for its beauty, historic charm, strong neighborhoods, vibrant businesses and involved citizenry.

The Administration Department

The Administration Department consists of the Chief Administrative Officer, Assistant Chief Administrative Officer, Public Information Officer, and an Administrative Secretary. The Administration Department links the vision set out by the elected officials with the departments responsible for implementing that vision within the parameters of the city's code of ordinances and adopted budget.

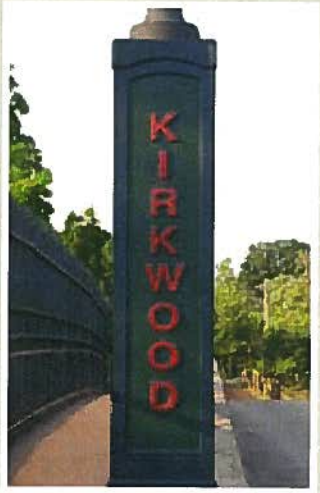
The Administration Department helps "facilitate the prompt, economical and efficient dispatch of city business" (Charter of the City of Kirkwood, Missouri, 1983). It also serves as an important interface between the council, the public, and city departments. Members of the department bring to the city professional city management and public relations skills and play an important leadership role in the governance of the community.

The Chief Administrator

The City of Kirkwood in its charter chose to place legislative and policy-making authority with the City Council and administrative authority with the Chief Administrative Officer.

Major Duties, Knowledge and Skills

The Chief Administrative Officer is directly responsible to the City Council for all operations of the city as well as implementation of policies and programs adopted by the Council. The Chief Administrative Officer appoints, directs and supervises all officers and employees of the City except for the City Attorney, the City Clerk, the Municipal Judge and the Provisional Municipal Judge. Appointment of subordinates is generally delegated to the appropriate Department Director.



The Chief Administrative Officer shall:

- Attend all meetings of the council and committees of its members.
- Supervise and be responsible for the preparation of the annual budget and capital program and submit both to the council.
- Submit to the council and make available to the public the complete report on the finances and administrative activities of the city as of the end of each fiscal year.
- Keep the council fully informed so that the council shall properly execute their legislative and policy making functions and make such other reports as the council may require concerning the operations of city departments, offices and agencies subject to the direction and supervision of the Chief Administrative Officer.
- Prepare and submit to the council a statement of policy recommendations for programs and priorities which, in the opinion of the Chief Administrative Officer, should be considered by the council.
- Keep the council fully advised on the financial condition and future needs of the city and make such other recommendations to the council concerning the affairs of the city as is deemed advisable.

Ideal Candidate

This is a key position within the City government environment and it is essential for the successful candidate to work closely with the City Council in carrying out city-wide initiatives and setting the tone and vision for the employees of the city. The ideal candidate will be fiscally conservative and have a strong background in finance; knowledge of and familiarity with the budgetary process and enterprise funds will be imperative. Prior experience with redevelopment projects and electric utilities will be beneficial.

This individual will be an outgoing, visible leader with a genuine interest in actively participating in the community. The ideal candidate must exhibit strong coordination and relationship-building skills in working with the entire organization and set a positive example of competence, professionalism, energy and work ethic to the organization and community.

The ideal candidate will be a professional leader who inspires the staff to achieve excellence. This individual should have experience in strategic planning and organizational development. Effective communication along with strong collaboration and team building skills will be necessary for this individual to be successful; advanced written and oral communication skills are imperative. The ideal candidate must have the capacity and interest to be an effective mentor and leader for staff.

This individual must be able to adhere to the highest ethical and moral standards and be able to display transparency.

Education

Interested candidates should possess a Bachelor's degree in Public Administration, Business Administration or closely related field. A Master's degree in Public Administration, Business Administration or closely related field is preferred.

Salary

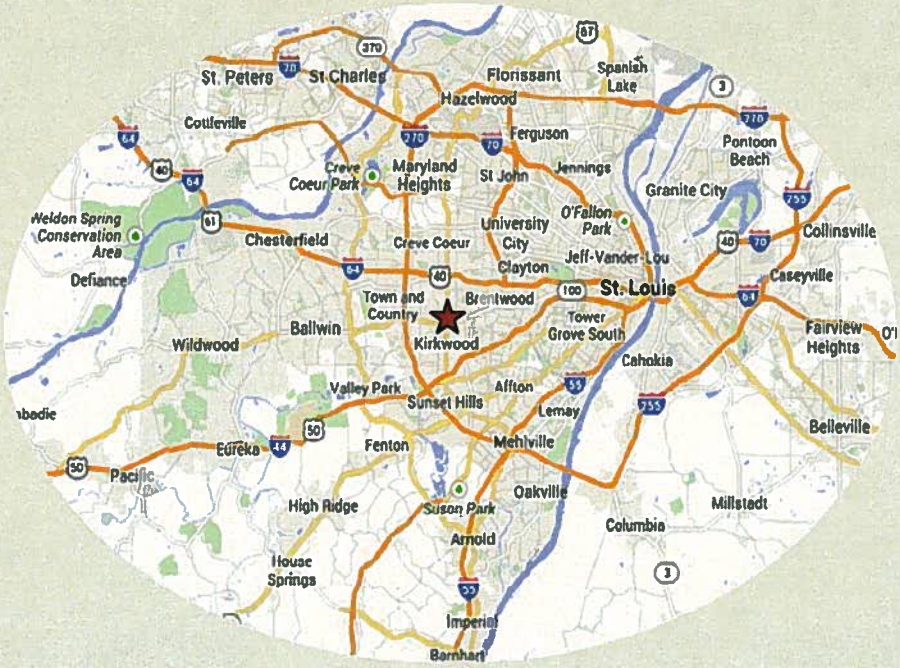
The City of Kirkwood is offering a competitive salary commensurate with experience and a comprehensive benefits package. Residency within the City of Kirkwood is required, and the reimbursement of relocation expenses will be included as part of the compensation package.

How to Apply

Interested applicants should forward a cover letter and resume to:

resumes@affionpublic.com
Reference: KIRKWOOD

Affion Public
20 North 2nd Street, Suite 200
Harrisburg, PA 17101
888.321.4922
Fax: 717-214-2205
www.affionpublic.com



affion PUBLIC

Delivering Leaders.

City of Dublin, Ohio
City Manager
Executive Search Firm Services
Request for Proposals

9923 Morris Drive
Dublin, Ohio 43017
614-766-5911
Phil Georgenson, President
July 18, 2014

B.

Why PMG:

1. **Pinnacle Society Member** – Consortium of the leading 75 recruiters in the United States based on successful placement production and ethical standards.
2. **Local** – Both PMG Principals live and work in Dublin, Ohio. This is a very personal search to us because it involves our community. We would be readily available to meet in person with key stakeholders. We are born and raised in Central Ohio and no firm would be better positioned to sell Dublin and its City Manager opportunity.
3. **Search Techniques** – We are a local firm who conducts national searches for diverse clients. We employ the most robust and leading edge techniques to source passive candidates. When you partner with PMG you will see the best talent available locally, regionally, and nationally.
4. **HR Foundation** – PMG's President is a former Human Resources Executive for two of central Ohio's largest employers. PMG was built on strong HR foundation where candidates are uniquely screened and vetted prior to being presented to our clients.
5. **Diverse Clients** – PMG is not a niche-specific firm. We partner with a diverse portfolio of clients on highly important, strategic positions. Clients partner with us because they recognize our recruiting expertise and process far exceeds that of most niche firms.

PMG Employment Consultants, headquartered in Dublin, Ohio is a leading national executive search, professional recruiting and human resources consulting firm providing expertise in all areas of employment to diverse clients around the United States. We offer a highly professional and results-driven approach to recruit and source candidates for specialized search assignments.

Our sole focus is to deliver results. Consequently, we experience exceptional loyalty from clients who appreciate our commitment to meeting objectives. When you partner with PMG, you have chosen the best in the industry.

Our firm has been in existence since 2002 and we currently have three professional staff. Phil Georgenson, President or Michael Georgenson, Vice President of PMG is authorized to make representations for and to bind the firm, their titles, and telephone numbers.

C.

1. The duties that will be performed outlined in the Scope of responsibilities are items that PMG performs on virtually every retained search assignment. We will certainly lead the process and provide guidance on all of these items. Quite frankly, most firms given an opportunity to respond to the RFP can perform these duties. Why PMG's clients partner with us is the depth of experience in navigating the complexities of these responsibilities and more important ones such as evaluating talent, engaging passive candidates, selling the opportunity, the negotiation process, and closing the deal with the selected candidate. More in depth detail of our expertise is outlined throughout the RFP.

2. PMG's philosophy and goal is to always match the best candidate with our client. We have a saying that people get hired for what they can do and fired for who they are. With that in mind, cultural fit is at the forefront of our sourcing efforts. We not only find a candidate with the functional expertise, we strive to find an individual who will work productively within the framework of the organization. As such, our proven strategy allows us to present only those candidates who are likely a fit from an expertise and cultural standpoint. Our search strategy will likely include:

A. Fully understand position and its unique requirements
   - Develop Position Profile
   - Establish hiring process and timeline
   - Set expectations
B. Develop search plan
   - Identify sourcing methods and potential targets
   - Select industry-specific association/member lists and strategic databases to utilize
   - Select potential advertising
C. Execute search plan
   - Personally reach out to hundreds of potential candidates both locally and nationally
   - Narrow and refine search techniques where necessary
   - Develop significant pool of potential candidates to screen
D. Candidate screening
   - Conduct extensive initial phone interviews with candidates
   - All viable candidates will complete Candidate Qualification Form that will become part of their candidate portfolio
   - Prior to being submitted as a candidate, local candidates will be interviewed in person and remote candidates will be interviewed via videoconference (no expense to City of Dublin)
E. Candidate selection
   - Select the most qualified candidates to be presented
   - Develop individual candidate portfolio that will include our summary, resume, Candidate Qualification Form, references, and any relevant supplemental material provided by the candidate or requested by the hiring leaders (see Appendix A below)
   - Present and meet with City Council to discuss submitted candidates. Select those who will move forward in the process
F. Interview Process
   - Execute previously agreed upon interview process
   - Organize initial, follow-up, and final interviews between candidates and hiring leaders
   - Debrief throughout the process with all parties involved
G. Candidate selection
   - Pinpoint leading candidate(s)
   - Check References
   - Schedule aptitude or personality assessments

H. Offer
- Be sure expectations are aligned on both sides
- Act as mediator in negotiations
- Facilitate acceptance, start date, logistics, and administrative details

I. Transition
- Prepare candidate for resignation from current position
- Assist with relocation if applicable
- Maintain close contact throughout process

J. Follow-up
- Ensure client's desired results were achieved
- Be sure all candidate's needs are met following start date
- Continue valued relationship with client and candidate

3. PMG specializes in highly complex, very strategic searches for well respected clients in Central Ohio and throughout the United States. We have outperformed our competition and "industry-specific" firms in a wide array of sectors. While we have never conducted a City Manager Search, this assignment is well within our expertise. Understanding and vetting the duties and responsibilities necessary for a candidate is the easier part. Evaluating talent, matching cultural fit, employing a stronger process, negotiation skills, human resources leadership foundation is why clients partner with PMG. We reached Pinnacle level status because we are one of the best recruiting firms in the United States.

Below is a sample of recent search assignments we have completed to demonstrate the diversity of our firm. Most of these positions had total compensation between $200K-$400K:

Chief Operating Officer (COO) – Prestigious law firm
Chief Financial Officer (CFO) – Multiple positions filled at several companies (diverse sized firms and industries)
Chief Executive Officer (CEO) – Venture capitalist-owned TPA
Chief Human Resources Officer – Large non-profit organization
President – Life Insurance Company
Vice President/General Counsel – P&C and medical malpractice provider
Vice President, Client Services – Large bank-owned brokerage operation
Senior Vice President, Human Resources – Regional multi-line insurer
President, Personal Lines – Large P&C carrier
Vice President, Business Segment – Large commercial lines carrier
Chief Technology Officer (CTO) – Venture capitalist-owned technology corporation
Vice President, Finance – Workers compensation TPA
Director, Finance – National non-profit charitable organization

Below is a list of current and past clients with whom we have conducted important searches:

Nationwide
Highlights for Children
Huntington Bank/Insurance Brokerage
Cardinal Health
CareWorks
Artromick Automation
STRS
Grange
Safe Auto
Dominion Homes
Preferred Living
Motorists Insurance Group
EWI
State Auto Insurance
Masdar Institute
Ohio Mutual
American Ceramic Society
Sygma Foods
Mount Carmel
OCLC
Buckeye Insurance
Travel Solutions
FinCor Holdings
Mercy Health System
Wells Fargo
Joseph James & Associates
CompManagement/Sedgwick
Avizent/Frank Gates
RLI
Assurex Global
PIA (Ohio, Indiana)
Market Source
SET-SEG
Central Mutual
Bricker & Eckler
JEYES
Make a Wish Foundation
Penn National
Talisman Capital Partners
Overmyer Hall &Associates
Pharma Mutual
PEM Commercial Real Estate
Friendship Village of Dublin
MAPFRE
Superior Environmental Group
CEC
NiSource
Hometown Urgent Care

4. As shown above, we have outperformed our competition in numerous diverse industries. We have specifically chosen hiring executives from vastly different industries as references to display the diversity of our portfolio of clients. We encourage Council Members to reach out to each of these individuals to discuss how PMG has helped their unique firms conduct several national executive and professional searches for local positions, as this one will be.

Faith Williams – Partner and Member of Executive Committee
Bricker & Eckler
614-203-4906
Williamsfaith3701@gmail.com

Mark Peacock – AVP, Human Resources and Talent Acquisition
Motorists Insurance Group
614-225-8319
Mark.peacock@motoristsgroup.com

Jennifer Gardner – VP, Human Resources
Highlights for Children
614-487-2663
Jennifer.gardner@highlights.com

Wendy Schutt – HR Executive
Talisman Capital Partners
Ohio Indemnity
614-582-1086
wendykschutt@gmail.com

5. We utilize a team approach to most assignments where we devote maximum resources for our clients' important searches. We always devote an individual who will be the point person to lead a search. If PMG is selected, Phil Georgenson, President will be leading the search for Dublin's next City Manager. Michael Georgenson, PMG's Vice President will also assist with this search. Very few in our industry worldwide match their credentials:

Phil Georgenson
President
614-766-5911
phil@pmgemployment.com
www.pmgemployment.com

- Lives and works in Dublin, Ohio (Tartan Fields).
- The Pinnacle Society Member – The Pinnacle Society (pinnaclesociety.org) is an elite consortium of the top 75 recruiters in the United States. Members are selected based on production levels, ethical standards and industry expertise. It is the Gold Standard for Executive Recruiters. Every recruiter submitting an RFP will claim to be a leading national recruiter, this is Phil's proof.
- Prior to staring PMG in 2002, Phil held the top Human Resources position for two of Central Ohio's largest organizations. It is extremely rare to be able to work with an executive recruiter who has sat in your Senior HR Officer's shoes. With Phil, you get the breadth of knowledge that comes with 30+ years recruiting and leading HR organizations from an internal and external standpoint.

- Throughout his career Phil has led C-level, executive, and professional searches for various clients. Phil's negotiation skills are unmatched when it comes to engaging a candidate in an opportunity or closing the deal. Having Phil on your team literally might be the difference in getting your first choice or having to settle on a backup candidate.
- Phil is a nationally recognized expert on the topic of recruiting. He has spoken at numerous conferences, sat on expert panels and trains new and experienced executive recruiters.
- Phil is an active member in several organizations including but not limited to Society of Human Resource Management, Human Resources Association of Central Ohio, Ohio Association of Executive Search Professionals, National Association of Personnel Services and several local civic associations.
- Phil earned a BS degree from the Fisher College of business at The Ohio State University and holds several industry designations.

Michael Georgenson, MBA
Vice President
614-538-0138
michael@pmgemployment.com
www.pmgemployment.com

- Lives and works in Dublin, Ohio (Hawk's Nest).
- Joined PMG three years ago and has quickly become a leading executive recruiter in the industry. Michael's "top billing" status has distinguished him among leading recruiters nationally. Michael has partnered with several organizations to successfully fill key executive and professional level positions.
- Michael gained significant industry experience prior to joining PMG. He held leadership positions in several large organizations including a Fortune 500 and large local insurance carrier.
- Michael is regularly asked to speak at seminars and conferences as an industry expert to specifically address techniques to recruit passive candidates and how companies can avoid losing out on top talent.
- He has served as Vice President of Education for Toastmasters International, chaired a successful United Way campaign, and has been a volunteer for inner city school reading programs, Mid-Ohio Food Bank, Operation Feed, and Nationwide Children's Hospital.

- Michael earned a BS degree in Financial Management from The Ohio State University, an MBA from Franklin University, and holds several industry designations.

6. PMG uses the most cutting edge and robust techniques for sourcing passive candidates across the United States. For this particular search we will use industry-specific association and membership lists, as well as other sophisticated sourcing mechanisms such as social media and web crawlers. We already identified hundreds of potential candidates or networking opportunities across the country using just one of our techniques. If we are selected to partner with the City of Dublin for this search, we have the ability to contact these individuals in a very short period of time.

7. From partnering with PMG, The City of Dublin is going to be presented with a diverse portfolio of leading candidates both locally and nationally. For a search like this, passive candidates (candidates not actively looking for a new position) are our target. The strongest candidates are happy and succeeding in their current position and need to be sold on the new opportunity. Because we live and work in Dublin and understand why this is such a great community, **NO ONE is in better position to sell Dublin, and its City Manager position than PMG**. Having an executive recruiter who can sell your opportunity is vital in getting a leading candidate engaged. Whether you choose to partner with PMG or another firm, we would strongly suggest choosing a local firm who can sell the community. This search would mean a lot more to PMG than most firms since this is our community. It would be very personal to us.

8. We complete position profiles and job descriptions for our clients. If we decide to have further conversations about a partnership on this search, we would be happy to share examples of what we have developed for other clients. For confidentiality purposes, we don't share information about other clients' searches without permission. Most of the searches we work on do not become public record so we need to be sensitive about the information we share. Again, if selected to have further conversation, we would be happy to discuss the proper way to share this information.

9. See #8.

10. One of the reasons our clients like to partner with PMG is because we cut a lot of the "waste" out of the search process. Many executive search firms generate unnecessary expenses that are charged back to their client, making a search much more expensive than it needs to be. Since we are local, there will be no travel expenses incurred for us to be present at meetings. Also, during our screening process, we conduct video conference interviews while other firms will fly themselves or the candidates to different locations incurring significant expense. We can virtually guarantee you will incur the least amount of expense outside the fees charged when partnering with PMG.

<u>Proposed compensation structure</u>

Our total fee will be 27.5% of the selected candidate's starting base salary. Our proposed payment structure will be as follows:

Inception of search: $15,000
When candidates are submitted: $15,000
Final payment: Balance of 27.5% of candidate's starting base salary minus $30,000

Example: If the candidate hired had a starting base salary of $175,000, PMG would bill the City of Dublin $15,000 at the inception of the search, $15,000 when candidates are submitted, then $18,125 on the candidate's start date. The total fee paid would be $48,125 in this example.

11. PMG is a family owned firm. We do subcontract and partner with minority and women-owned business enterprises on a regular basis. We are a member of two separate recruiting firm networks (Top Echelon and NIRA). Both have significant membership by minority and women-owned firms. All of the clients we work with value diversity so developing a diverse portfolio of candidates for each search is a priority for PMG.

*See Appendix A below which is a Sample Candidate Portfolio including our summary, resume, Candidate Qualification Form (CQF), and references. PMG would develop a similar portfolio for all City Manager candidates submitted.

SAMPLE CANDIDATE PORTFOLIO

Candidate Name

Candidate is currently Vice President of Business Development for XXXXXXXXXX. She has a total of 17 years experience with the current employer and has progressed into her position from several leadership roles. She was promoted numerous times.

Her career has been on a fast track. Current peers indicate that she is high-energy, very strong at building relationships, and is slotted for future leadership roles, most likely being the top position within their organization.

Her past positions have given her strengths in managing large operations, product knowledge of all lines of business, and experience and track record in growing profitable business through multiple distribution channels. Her progression to higher levels of responsibility within the organization indicates that she is a high achiever and has progressed faster than her peers. Her educational background is also unique in that she has a BA in Finance, but also has an FSA from the Society of Actuaries.

For her next opportunity, she is looking for a smaller organization where she can exert more influence over the entire operation. She would also like to set strategic direction for the organization, and is looking to increase her expertise and brand in more areas than her current focus on business development.

Her current style could be described as high-energy, focused and quietly effective. Because of her actuarial background, she is able to analyze large amounts of data and feedback in order to make quick and facts-based decisions. She also is great at building lasting, productive relationships. One skill set that became evident is her ability to be able to address conflict in an effective and productive manner. She is frequently asked within her organization to provide leadership to change large cultural gaps that have impacted the organizations ability to work as a productive team.

Candidate Resume

XXX Street Name ✱ City, State Zip
Cell: (xxx) xxx-xxxx ✱ E-mail: xxxxxx@aol.com

Summary of Qualifications

Extensive financial services and life insurance knowledge with a solid history of exceeding business results. Experience in product development, pricing, marketing, sales, and financial reporting. Proven ability to navigate between setting strategic direction and driving execution of plans. Strong collaboration, analytical, and execution skills. Positive, self-motivator with high energy.

AREAS of EXPERTISE

... Developing and Executing Strategic Plans Through Highly Engaged Teams ...

- Product Development
- Relationship Building
- Cultural Change
- Strategic Business Planning
- Process Improvements
- Conflict Management
- Risk and Financial Management
- Execution
- Facilitation

EXPERIENCE

XXXXXXXXXX (www.XXXXXXXXXX.com)
Fortune 200 company, focused on domestic property and casualty insurance, life insurance, retirement savings, asset management, and strategic investments.

Business Development, Vice President 2004 - Present
XXXXXXXXXX Financial Life Insurance Segment
Develop new business opportunities and channels; direct all product development activities; lead development and oversee project management for segment initiatives; coordinate product launches; and manage illustration software for independent broker dealers, producer groups, career agents, wirehouse regionals, banks, and brokerage general agencies.

"Candidate creates very positive enthusiasm for the achievement of business goals. She is a natural team builder. She is very good at getting others to understand the need for focus and prioritization, versus trying to do everything." – Senior Vice President, XXXXXXXXXX Financial

Highlights:

- Redesigned the life portfolio resulting in more customer friendly, competitive and profitable products for our target markets; increased product development productivity and quality including two patent pending services.
- Led segment's cross sell activities through XXXXXXXXXX Exclusive Agents; execution activities began in the second half of 2007 have resulted in a 30% increase in Apptivity through 2008.
- Designed and implemented the life portfolio's illustration software; system has been the top rated according to market metrics for the last two years.
- Redesigned the term instant issue technology for exclusive agents improving usability and achieving over a 250% growth rate of policies issued within six months after

- Defined and implemented reporting and technology infrastructure to support BGA channel, a new distribution opportunity.
- Negotiated and implemented the proprietary product development, mod-co reinsurance arrangements, and reporting support for M Financial Group, a key producer group.
- Served as one of a very few officers appointed to lead a cultural change initiative by becoming a certified coach to train and develop XXXXXXXXXX facilitators in cascading XXXXXXXXXX values through the enterprise.

Product Management, Vice President 2001 - 2004
XXXXXXXXXX Financial

Responsible for strategic planning, risk management, resource allocation, growth and profitability for fixed annuities, variable annuities, traditional life, variable life, retirement plans, and structured products. Brought consistency to individual product lines providing a smooth transition as the organization evolved to segments.

"Candidate is exceptionally analytic. She can read between the lines and come up with solutions and follow up questions that others cannot." – Vice President, XXXXXXXXXX Financial

Highlights:

- Implemented consistent approaches to financial reporting and risk reviews for all lines.
- Drove strategic planning for the business lines and coordinated the lines project funding; served on the company's resource planning committee for funding decisions.
- Implemented a Global Medium Term Note Program and managed over $4.6 billion of assets; represented XXXXXXXXXX to potential investors in seven roadshows to Europe, Australia, and Asia throughout the life of the program.
- Developed a variable annuity strategy resulting in the redesign of the entire variable annuity product portfolio which resulted in an improved risk profile and an additional 3% - 5% ROTC.
- Sponsored a project team to define how to improve life insurance market share and enter into new distributions; this served as the basis for the first life segment strategy.
- Became a cultural change agent by facilitating XXXXXXXXXX values seminars for over 500 associates.

Fixed Product Management, Officer – Vice President 1998 - 2001
XXXXXXXXXX Financial

Responsible for strategic planning, risk management, growth and profitability for fixed products.

Highlights:

- Developed a fixed annuity strategy and grew fixed annuity production to over $2 billion by increasing production in key bank partnerships and through exclusive agents.
- Proposed and implemented the Medium Term Note (MTN) Program; Collaborated with investments to fund over $2 billion achieving returns in excess of the stated goal.
- Built and managed the investment strategy for both the fixed annuities and MTN Program.

Life Product Specialist, XXXXXXXXXX Life Sales (1996 – 1998)

Product Development Actuary, XXXXXXXXXX Life and Annuity Areas (1992 – 1996)

Education

Bachelor's Degree, Business Administration 1992
Miami University, Oxford, OH
Majors: Finance, Decision Sciences

FSA, Society of Actuaries 1998

References furnished upon request

XXX Street Name ✸ City, State Zip
Cell: (xxx)-xxx-xxxx ✸ E-mail: xxxxxxxx@aol.com

Candidate Qualification Form

Name__Candidate_____
Date___May 17, 2013_____

1. What is it about this opportunity that prompts you to pursue it?

   First, this position provides me the opportunity to be a part of a successful and growing organization with a keen focus on agent satisfaction. It also appeals to my passion of protecting customers' families and futures through offering life insurance.

   The opportunity draws upon many of my experiences at XXXXXXXXXX where I have found success in results coupled with personal enthusiasm and engagement. For example, I've recently enjoyed leading XXXXXXXXXX in expanding life insurance sales through our property and casualty agents. I have also enjoyed increasing engagement to life insurance associates by assembling agents, inspirational speakers, and real life stories that inspire the value each associate brings to our customers and agents each day.

2. What are three things you are looking for in your next opportunity that may not exist in your present position?

   1. I am looking for the ability to directly control more aspects of a business rather than managing through influence as I do in my current position.
   2. I would like to continue to set strategic direction for a line of business and seek to play a larger role in setting direction for the enterprise. My current role has limited opportunity to participate in influencing broader company direction.
   3. I am interested in increasing my expertise and brand in more areas than my recent focus on product and business development.

3. Selectively looking or actively looking? (1-10, 10 being the highest)

   Selectively looking, 2. I have been proactively working with XXXXXXXXXX's senior management for new opportunities after the life insurance business meets two critical deadlines in 2008. The XXXXX opportunity is the only opportunity I am currently considering outside of XXXXXXXXXX.

4. Current Base: date of expected raise and review: bonus potential; actual bonus;vacation;401k;profit sharing; company car; tuition reimbursement; other:

   2008 Compensation:
   Current Base Salary: $234,814, with the latest salary adjustment in 4/2008
   Short Term Incentive Target: 50% of base salary adjusted for individual and company performance
   Long Term Incentive Target: $125,440 adjusted for enterprise performance and paid

5. What are your salary expectations?

   Negotiable

6. Willingness to relocate. Preferences.

   For at least the next two years, I am not interested in relocating.

7. Why do you think you are well suited for this position? List most relevant qualifications.

   I believe that my leadership will provide XXXXX with continued success characterized by profitable growth of the life insurance business with engaged agents and associates. My relevant qualifications are:
   1. The unique ability to balance profitability and risk with sales growth.
   2. A proven history of achieving sales growth and satisfaction by establishing strong relationships with and delivering on critical needs of distribution partners.
   3. The ability to set strategic direction with an excellent track record of execution of those strategies.
   4. A history of creating engaged teams and associates which creates a healthy and productive culture.

8. Significant accomplishments in your career you are most proud of:

   There are several key accomplishments that stand out for me.
   In 1998, when I headed the fixed products area, I proposed and built a new business for XXXXXXXXXX Financial. This provided XXXXXXXXXX with needed growth in spread based business and capitalized on a competitive advantage unique to XXXXXXXXXX. From a personal perspective, I gained confidence in my ability to look outside of the organization to discover and develop initiatives that fit XXXXXXXXXX's needs and capabilities. This was a significant accomplishment for me early in my career as a XXXXXXXXXX executive.

   During late 2007 and 2008, I was a key player in turning around the culture and partnership of the affiliated distributions. A few years before, partnership and trust were lacking between home office and the field. Over the last two years, we have completely transformed the attitude and satisfaction of the affiliated distributions. Today the tone, the feedback, and the partnership are overwhelmingly positive. While I was a team player in this transformation, it has taught me how to effectively listen closely to our partners and rely on the wisdom of advisory groups as a key input to deliver what matters most to the field. Related to my role in the life insurance segment, the agents have expressed a complete turnaround in our product development, technology support, and the ease of doing business.

We will deliver 21 products over a two year period, while previous years' development never exceeded 4 products per year. While I am proud of the improved productivity, I am most proud of the product success. Instead of launching just a product, I have taken a holistic solution approach to each development effort. For example, the term product was repriced with a specific focus on our target market and included a redesign of the electronic application responding to agent feedback. The improved product and usability led to a 250% increase in policies issued during the first six months after launch. As another example, our No Lapse Guarantee UL product was coupled with improved usability of the quoting system, simplified underwriting guidelines, and a proactive policy management approach to ensure a customer is on track with the intended guarantee. These were all issues raised from the distribution channels that were incorporated into the product solution. The recent successes have reinforced my belief that launching a holistic solution and continuing to make it simpler for the field is the key to successful execution of life insurance products. Finally, I am proud of the role I have played in associate engagement within the entire life insurance unit and my own team. After leading business development for two years, I drove an 11 point increase in engagement in my own team and led the entire life insurance business in a 7 point increase. I did this by addressing three major areas for the business line: 1) creating an associate advisory group, 2) cascading the strategy to all associates in a meaningful way and 3) bringing the meaning of life insurance to all associates so that they have an appreciation of how they contribute to this noble purpose.

9. Reasons for each job change:

In my professional career, I have spent sixteen years at XXXXXXXXXXX. The last two roles I held offered me some specific experiences that I was looking for to enhance my leadership.

Vice President, Business Development: This was an opportunity for me to focus on one line of business to drive and execute strategic direction. Since my previous role focused on breadth, I was looking for an opportunity for more depth. I wanted to pull from my various experiences and lead execution activities to drive growth out of a line a business that was facing historically flat growth. In addition, I was able to pilot activities for the line to see if they increased engagement and productivity.

Vice President, Product Management: I was looking for an opportunity to expand my brand from a 'doer' to a 'leader'. This role gave me hands on experience at leading executives. This role also enabled me to develop from more a contributor to a leader of people. It helped me learn the art of effective delegation while staying engaged with all business lines. This is the role where I began to appreciate and focus on getting results through people rather than relying on myself.

10. Describe your work style.

My partners and direct reports characterize my style as energetic, customer focused, caring, and quietly effective. I assemble and analyze large amounts of data and feedback efficiently to make quick and fact based decisions. I set high expectations for myself and those around me. I focus teams and set expectations on achieving excellence, not perfection.
I do not shy away from conflict and choose to address conflict in an effective and productive manner. Frequently, I have been asked to step into individual situations and provide leadership to change large, cultural gaps that impact the organization's ability to work as an effective team.

11. What work atmosphere do you thrive in (fast, systematic, chaotic, organized, fun etc.)

I thrive in an environment where there is an alignment of objectives and values. One key value that is important to me in an organization is accountability. I believe this value is one of the key ingredients for a healthy and productive culture.

I tend to work best in a fast paced and empowering culture. I tend to create an environment with energy, engagement, and customer focus complimented with simple processes to support execution.

I have an appreciation for process and use process as an enabler for execution. In my experience, it has offered value in communication and alignment as well as a path for continual improvement.

Candidate

XXXX Street Address ✸ City, State Zip
Cell: (xxx) xxx-xxxx ✸ E-mail: xxxxxx@aol.com

Professional References

Individual	Relationship
Reference #1, VP Individual Investments Operations XXXXXXXXXX Financial Work: (xxx) xxx–xxxx	Reference #1 worked for me in the life business until last year when she became a peer of mine in the annuity business. Reference #1 will be able to offer feedback on my management style and my ability to develop leaders. She can also speak to my accomplishments in the life business with first-hand knowledge of my style and how I get results through people. *Comments made directly to Phil Georgenson: I think Candidate made an awesome decision to go to XXXXX. She is brilliant, intelligent and excellent at building relationships. She is very strategic and can translate strategy into the necessary tactics to get the job done. She is so smart she sees thing before others. She does well in the field and is an excellent educator to the agents. She was an excellent manager who was very good at giving positive and constructive feedback, and in developing her people. She works best in a role that allows for growth and forward thinking. She can translate strategy into tactics better than anyone I know, and can develop the processes to get the job completed. Candidate is also a very realistic business leader and can see things as they exist.* *Candidate likes to be involved in the decision making process and like to feel valued and appreciated. She is also very open to receiving any developmental feedback. This is a real loss to XXXXXXXXXX. XXXXX made a good decision.*

Reference #2, AVP Affiliated Sales XXXXXXXXXX Financial Work: (xxx) xxx-xxxx Cell: (xxx) xxx-xxxx	I have worked with Reference #2 throughout various roles at XXXXXXXXXX for over 10 years. In her current role, she is responsible for sales management and strategy for our affiliated exclusive and independent agents. She can provide knowledge of my involvement and effectiveness with agent relationships and advisory groups. Since she also plans educational, motivational, and recognition meetings for the field, she can offer a perspective on my ability to connect with and inspire agents through individual relationships and large-scale presentations. *Comments made directly to Phil Georgenson: Candidate adds value every day. She is very much respected in the field because of her ability to communicate complicated issues in an understandable manner. She is an excellent facilitator and can get opposing sides to agree on conflicting issues. She can be very strategic and can mesh the tactics with the strategy very well. She does great at everything she does and will be outstanding at XXXXX. Because she was able to function at XXXXXXXXXX so well, as complex and bureaucratic as it is, she should be extremely successful at XXXXX if they are more nimble. Compared to her peers Candidate is more dynamic and more strategic. She definitely would have been the leading candidate for her boss's position. She was offered the CFO role within XXXXXXXXXX Life but turned it down because she did not want to be solely on the financial side of the business. She was great to work for and to work with and will truly be missed.*
Reference #3, VP Life Operations XXXXXXXXXX Financial Work: (xxx) xxx-xxxx Cell: (xxx) xxx-xxxx	As colleagues for over a year in the life business, Reference #3 can speak to his experience with me as a partner and my ability to lead and influence the organization. He can also offer feedback on my relationships with distributions since together we are frequently responding to the demands and the issues faced by the multiple distributions we serve. Reference #3 can give perspective on how I handle difficult situations and can turn them into positive experiences. *Comments made directly to Phil Georgenson: XXXXX made an outstanding choice. She will do extremely well in that role. Candidate is an effective leader, team player who is supportive of her peers. She is intelligent and energizes those that are around her. She is better than most people that have 25 years or more experience because she has developed at a much faster rate and has gained a greater depth of experience. She is more energetic, creative than most of her peers. She sees details that others miss. If she stayed at XXXXXXXXXX she would have no doubt led a business unit. Candidate can also be very good at facilitating discussions and can relate well to her audience. She has great leadership skills. Candidate is just rock solid in everything. You got a good one. She is just awesome.*